

# Maximizer User Manual

Last Update: 8<sup>th</sup> December 2003

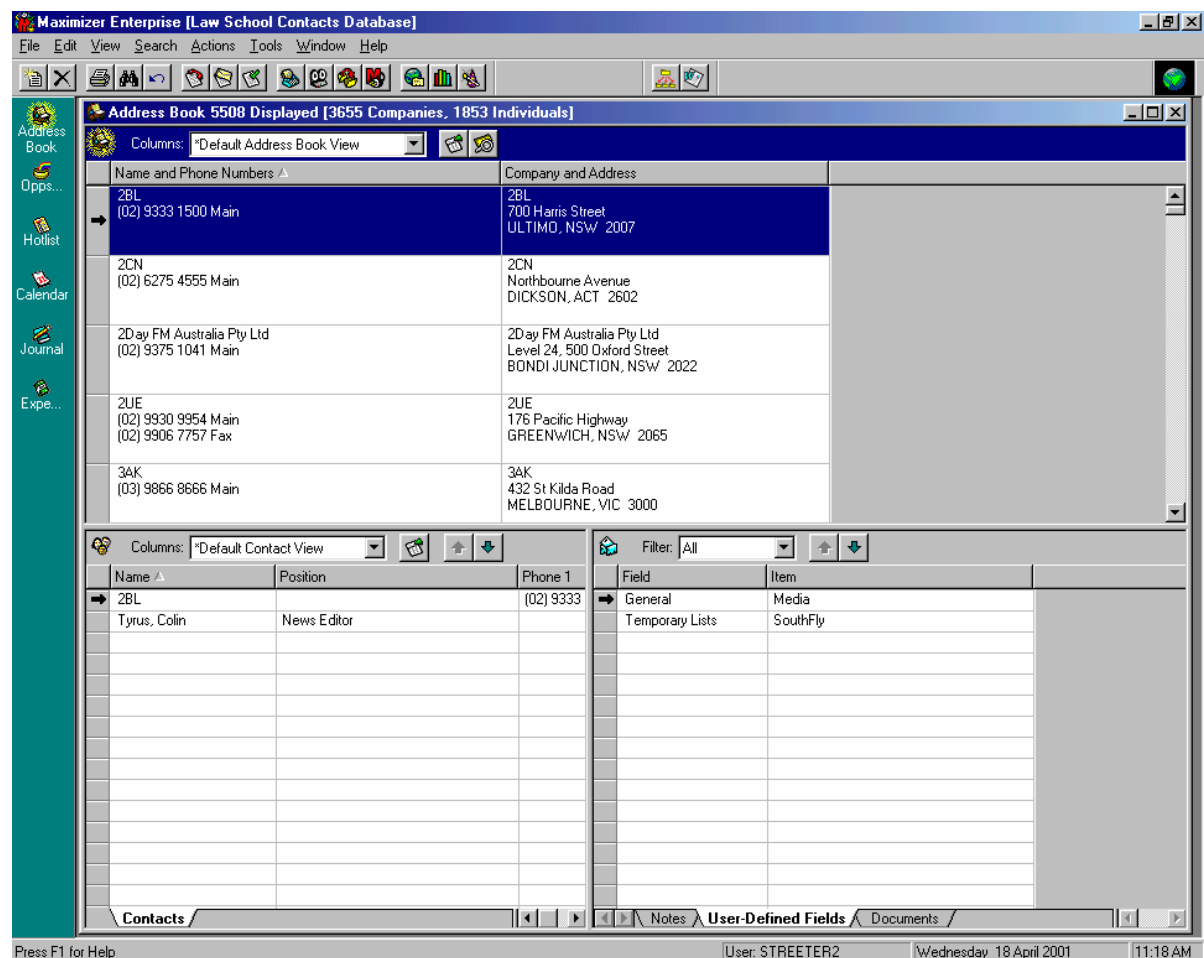
[<http://www.law.unimelb.edu.au/iss/informationssystem/training/instructions/maximizer2002.pdf>]

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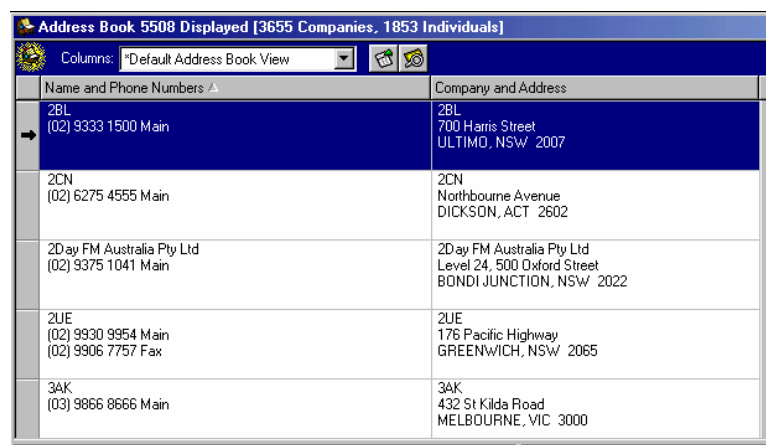
## Layout of Maximizer Enterprise



While Maximizer consists of many window, the three main windows used are the Address Book window, the Contacts window, and the User-Defined Fields window.

### The Address Book Window

This provides you with a list of Client Names, Addresses and Phone Numbers.

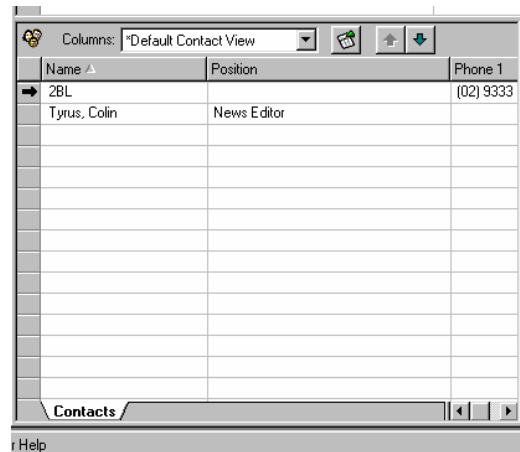


It can show all the records in the database or a selection of those records. When we first start Maximizer, this window contains a list of all Companies and Individuals.

## The Contacts Window

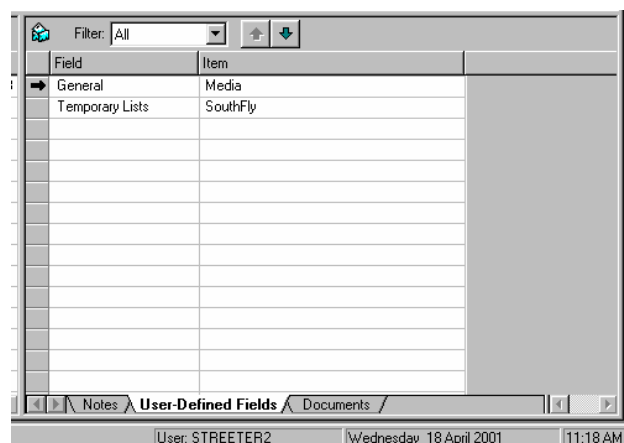
This window contains a list of a Company's Contacts. For example, one of the Companies with whom we correspond may have several employees with whom we are in contact. Whenever we send mail to one of these employees, the Company's address is used.

An Individual has his or her own address and is not attached to a Company.



## User-Defined Fields Window

The small bar along the bottom of this window selects Notes, User Defined Fields or Documents. Currently only the User Defined Fields section is in use. These fields contain some basic information on the person, such as their email address, but are mainly used to contain information on the mailing lists to which they belong.



## View All or a Selection of Records

To change which records are displayed in the Address Book window:

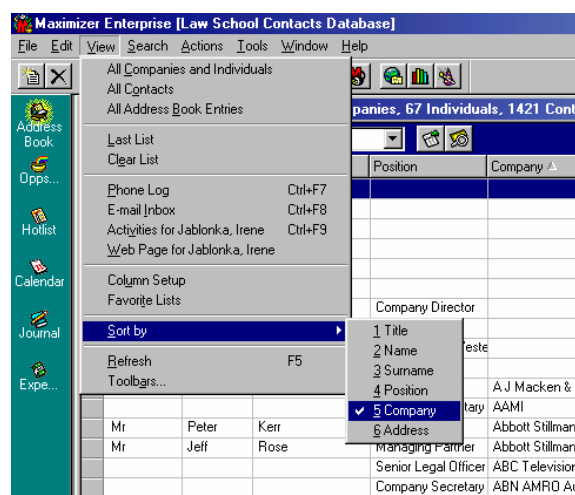
- 1 From the menu bar select *View*
- 2 Select the records required to view  
*All Companies and Individuals*  
*All Contacts*  
*All Address Book Entries* (Companies, Individuals, and Contacts)

## Sorting Entries for Viewing and Printing

Entries can be sorted on any column shown. If a new column layout is required refer to *Create a New Column Setup* under Columns. When printing, the sort option selected on the Address Book window will be the sort option used.

To sort on a column either click the column name or:

- 1 Select *View*
- 2 Select *Sort*. The column names will be displayed with a tick against the sorted column.



- 3 Select any column shown.

## Searching

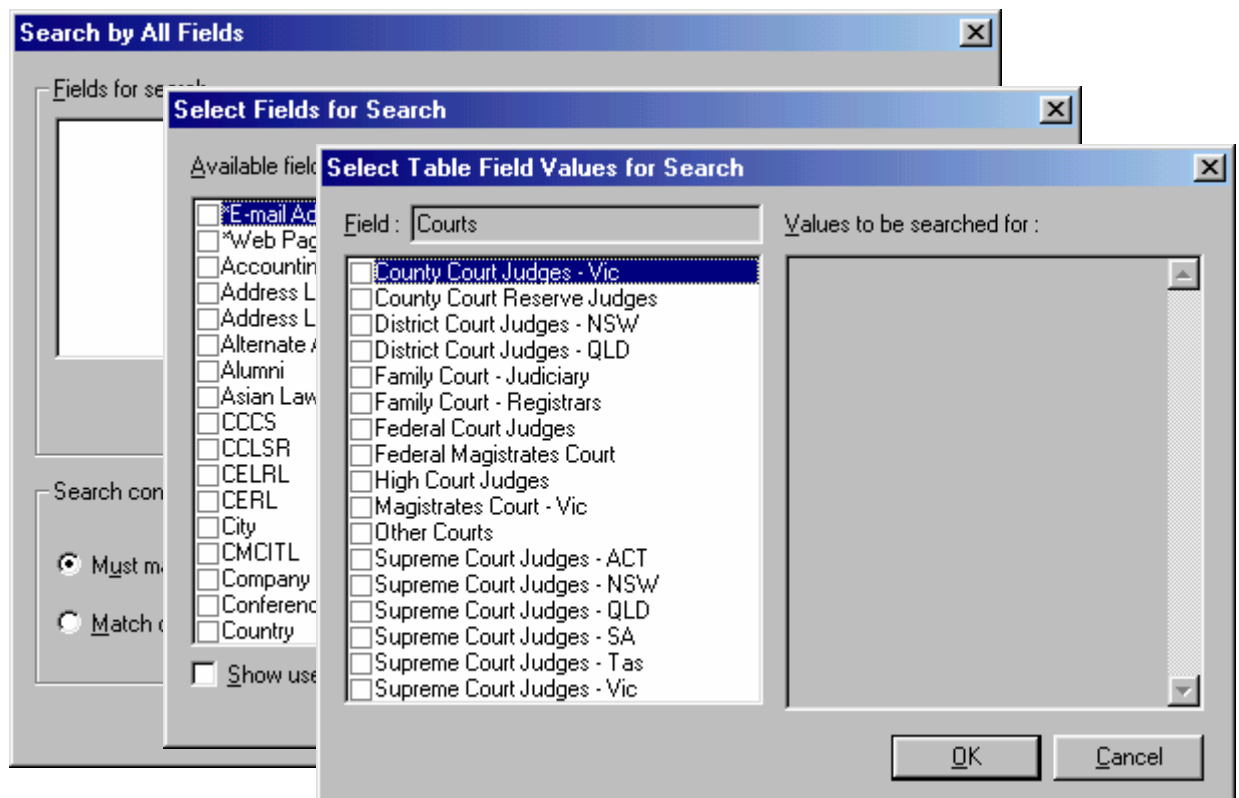
### Locating a Company or Individual Record

To simply search through the address book entries currently displayed, click into the main address book window and then start to type the beginning of the name for which you are searching. Your cursor will move to the relevant record as you type. To ensure the record for which you are searching is included in the display, refer *View All or a Selection of Records* under *Layout of Maximizer Enterprise*.

### Searching for Members of a List

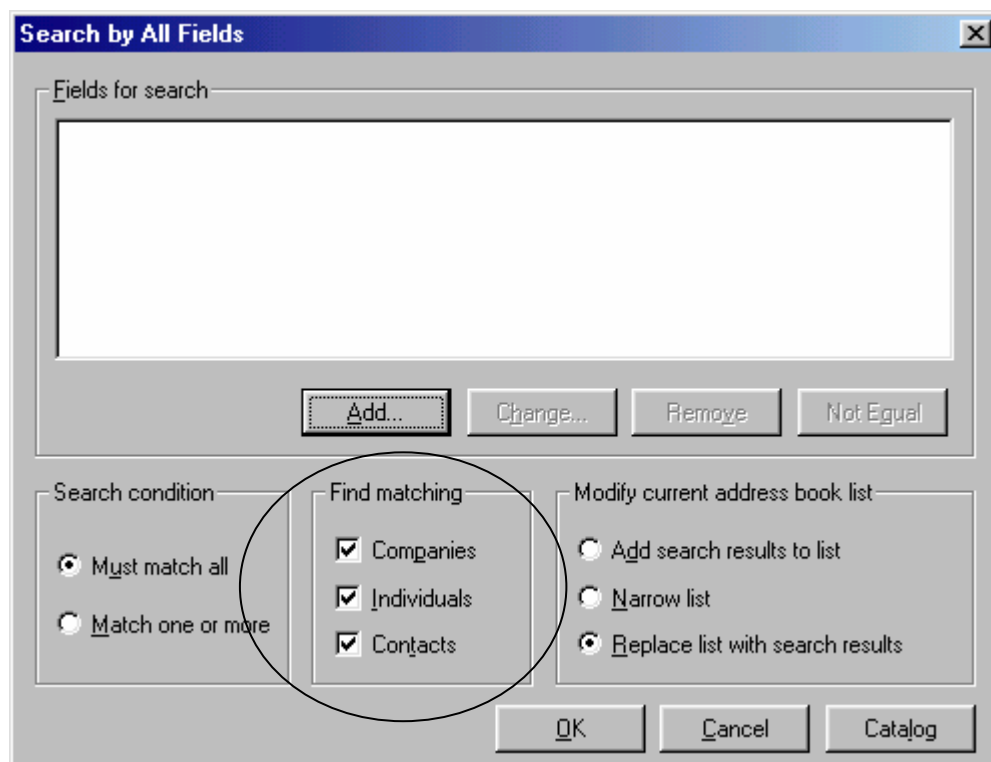
To search for all members of a certain list,

- 1 From the bar menu Click *Search*
- 2 Select *All Fields*
- 3 Click on *Add*
- 4 To shorten the list of alternatives, click *show user defined fields only*
- 5 Select the applicable category (eg “Permanent Lists”) and *OK*.



- 6 Select the mailing list you wish to search for.
- 7 Press OK until you get back to the Search by All Fields box.

- 8 In the Find matching section of this box, select the types of records that you are searching for. eg. Companies and Individuals.



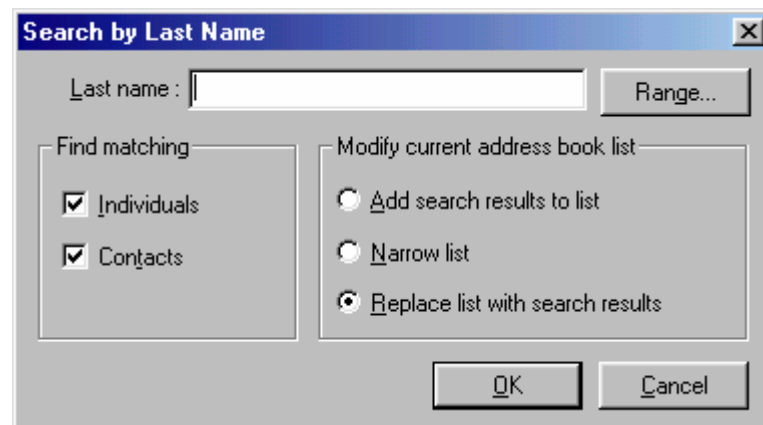
- 9 In the Modify current address book list section, indicate how you wish the found records to be displayed.
- You may Add the search results to the current list displayed
  - Narrow the list by limiting the search to only the records currently displayed in the main address book window.
  - Replace the current list with the records found in this search

Once Maximizer has located all entries subscribed to this list (it may take a few seconds), the list of entries may then be added to with additional searches.

## Searching for an Individual or Contact

To search by last name.

- 1 From the bar menu Click on *Search*
- 2 Select *Last Name*



- 3 Type the last name or if only part of the last name is known, type the known section of the last name with an asterisk before the word. For example “\*donald” will find both McDonald and Macdonald. It should be noted that a search without the use of asterisks will work much faster.
- 4 Select the area in which you are searching, for example Individuals.
- 5 Indicate how you wish the found records to be displayed.
  - You may Add the search results to the current list displayed
  - Narrow the list by limiting the search to only the records currently displayed in the main address book window.
  - Replace the current list with the records found in this search

Depending on the display option selected, if Maximizer finds any Last Names matching your text, these will now display in the Address Book window.

**Note** that at the bottom of the search results Maximizer also displays surnames that include the query as the first part of their name. For example, searching for “wood” will first show us any people with the surname Wood, but it may also show us Woods, Woodward etc. This can help us search for long, complex names, by simply typing in the first few characters.

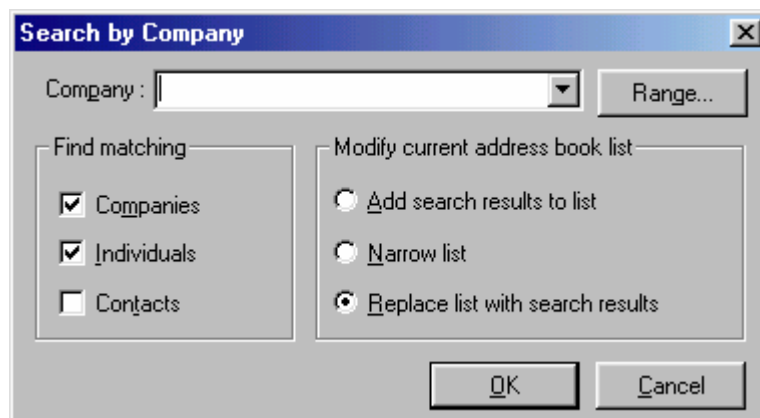
Also note that these types of searches are not case-sensitive.



## Searching for a Specific Company

Searching for a Company may be more difficult than first imagined, for example, Acme Inc. may have previously been entered as “Acme Incorporated” or other similar spellings: searching for “Acme Inc.” alone may not find the correct company. The best way to search for a company is to find a word from the Company name that we are fairly sure will be in any incarnation of the name, and will separate this specific Company from the others in the database. In this example, we would search for the word “Acme”.

- 1 Form the bar menu Click on *Search*
- 2 Select *Company*



- 3 Type the known section of the company name with an asterisk before and after the word. For example “\*acme\*”. This will search for the word “acme” in any part of the company name - with or without words before or after acme.
- 4 Select the area in which you are searching, for example Companies.
- 5 Indicate how you wish the found records to be displayed.
  - You may Add the search results to the current list displayed
  - Narrow the list by limiting the search to only the records currently displayed in the main address book window.
  - Replace the current list with the records found in this search

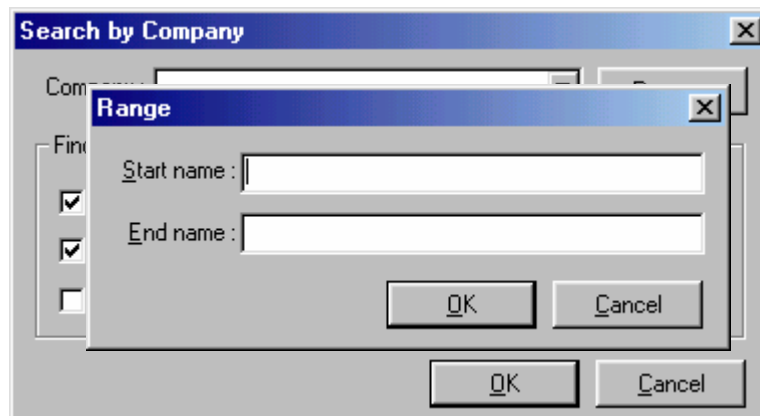
Depending on the display option selected, if Maximizer finds any Companies matching your text, it will now display them in the Address Book window.

**Note** that these types of searches are not case-sensitive.

## Searching for a Range of Entries

When doing searches, you can search for a Range of entries. If for example you wanted to bring up a listing of companies from L-Z, you would:

- 1 From the bar menu Click on *Search*
- 2 Select *Company*
- 3 Select *Range*



- 4 Enter the Range of entries that you wish to search for and press OK.
- 5 Indicate how you wish the found records to be displayed.
  - You may Add the search results to the current list displayed
  - Narrow the list by limiting the search to only the records currently displayed in the main address book window.
  - Replace the current list with the records found in this search

Depending on the display option selected, if Maximizer finds any Companies matching your range of text, it will now display them in the Address Book window.

**Note** that these types of searches are not case-sensitive.

## Searching for Duplicates

You can use searching to check for **duplicates**. To do this:

- 1 Ensure that you have all records displayed – go into your view menu and select *View all Companies and Individuals*
- 3 Go into the *Search* Menu and select *Check Name and Phone Numbers for Duplicates*. All of the duplicated records will appear in the address book list in front of you.

## Mailing Lists

### Creating Lists of Entries

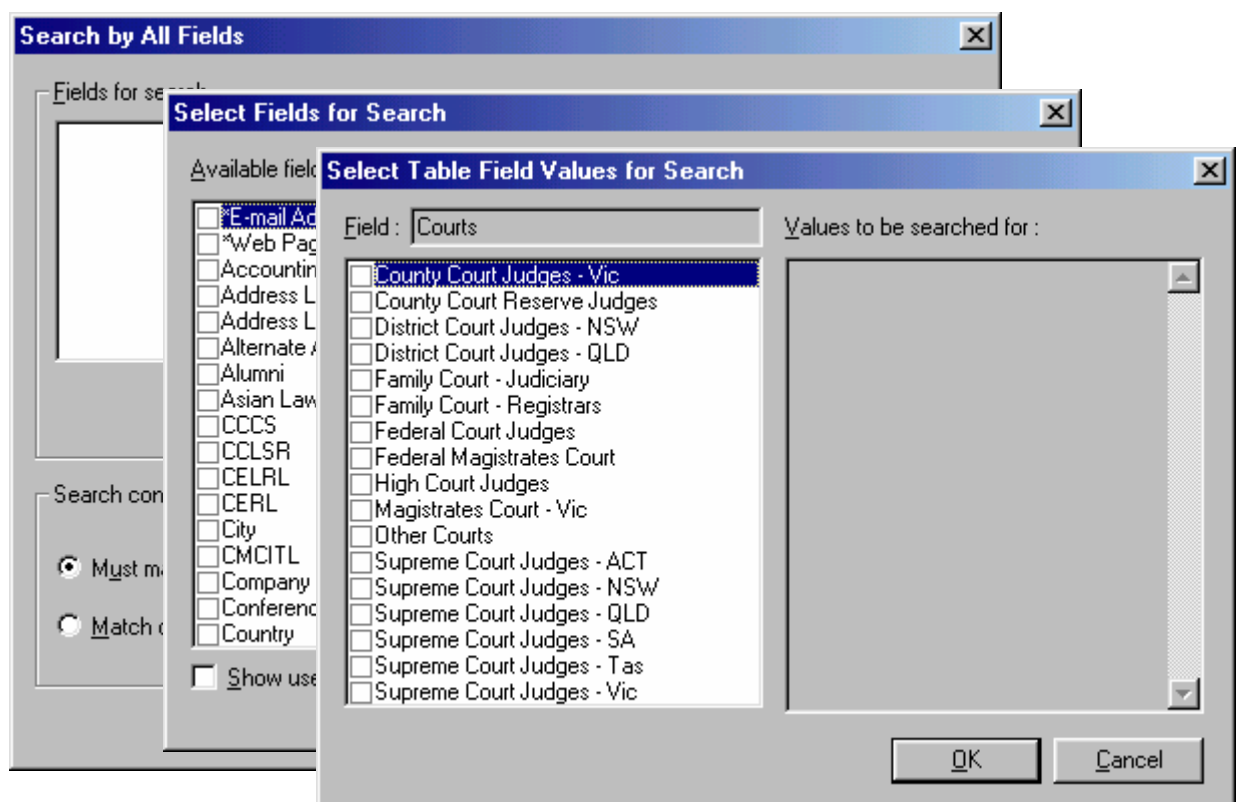
A list of entries may be created for a number of purposes but the most common one would be in preparation for a mail out.

Lists may be created through a search or several searches but it is also possible to simply select a few records through the address book window and make these records into a list.

### Searching for Members of an Existing List

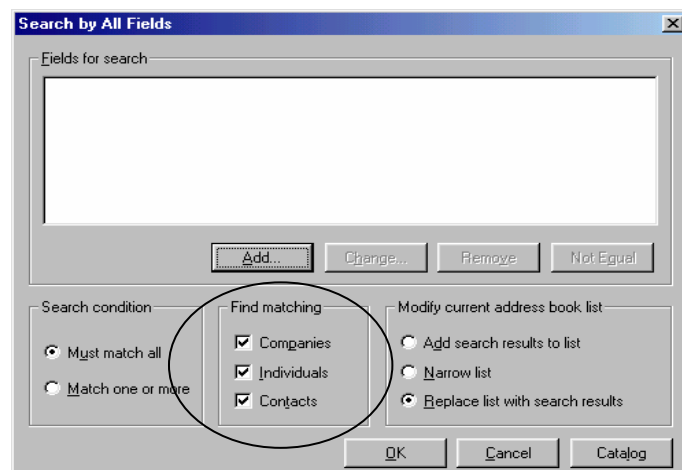
To search for all members of a certain list,

- 1 From the bar menu Click *Search*
- 2 Select *All Fields*
- 3 Click on *Add*
- 4 To shorten the list of alternatives, click *show user defined fields only*
- 5 Select the applicable category (eg “Courts”) and *OK*.



- 6 Select the mailing list you wish to search for.

- 7 In the Find matching area, select the types of entries that you are searching for, eg. Companies and Individuals.

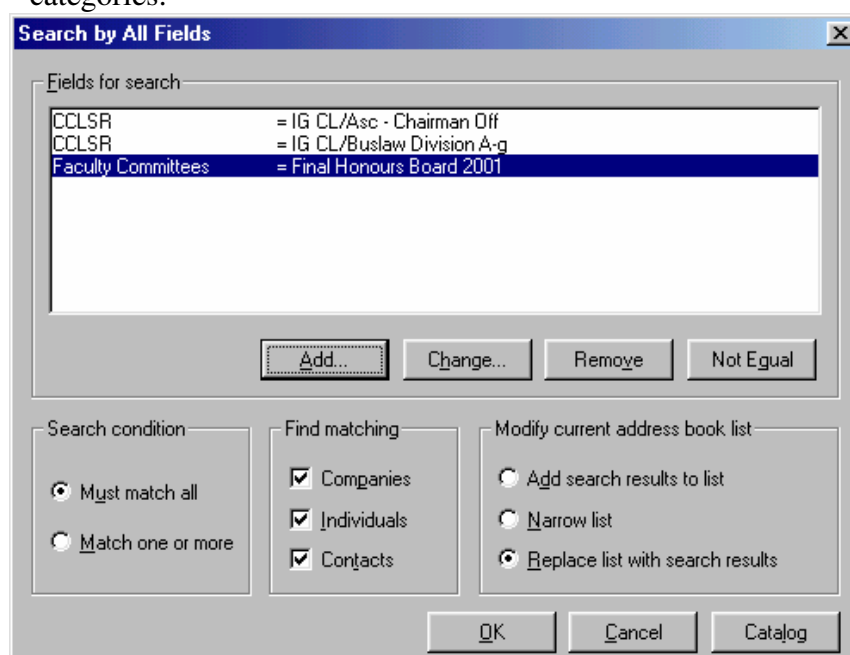


- 8 Indicate how you wish the found records to be displayed.
  - You may Add the search results to the current list displayed
  - Narrow the list by limiting the search to only the records currently displayed in the main address book window.
  - Replace the current list with the records found in this search

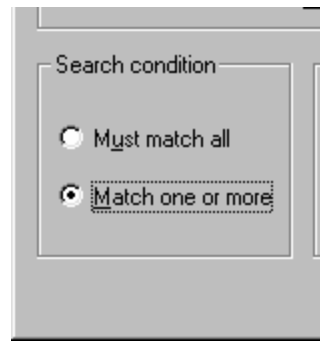
Once Maximizer has located all entries subscribed to this list (it may take a few seconds), the list of entries may then be added to with additional searches for lists, individuals, or companies.

To bring up the members of more than one list at the same time,

- 1 Do step 1-4 as above.
- 2 Then select all the lists that you wish to bring up, from one or more categories.



- 3 Change the Search Condition to Match one or more. This will bring up all the members of all the selected lists.



- 4 In the Find matching area, select the types of entries that you are searching for, eg. Companies and Individuals.
- 5 Indicate how you wish the found records to be displayed.
  - You may Add the search results to the current list displayed
  - Narrow the list by limiting the search to only the records currently displayed in the main address book window.
  - Replace the current list with the records found in this search

Once Maximizer has located all entries subscribed to this list (it may take a few seconds), the list of entries may then be added to with additional searches for lists, individuals, or companies.

## Remove Selections from an On-Screen List

It may be necessary to remove particular selections from the current on-screen Address Book list. To do this:

- 1 Select the appropriate records by clicking in the grey box to the left of the name in the Address Book window (where the arrow is). This box will now turn dark.
- 2 From the menu bar select *Edit*
- 3 Select *Invert Selection*
- 4 From the menu bar select *Edit* again
- 5 Select *Make the Selected List Current*

The entries originally selected will now have been removed from the current list. You can print or export this list at this point. A permanent list has not been created for these entries. See *Setting up a new User Defined Field (Mailing List)* and *Moving Multiple Contacts to a New List* for how to do this.

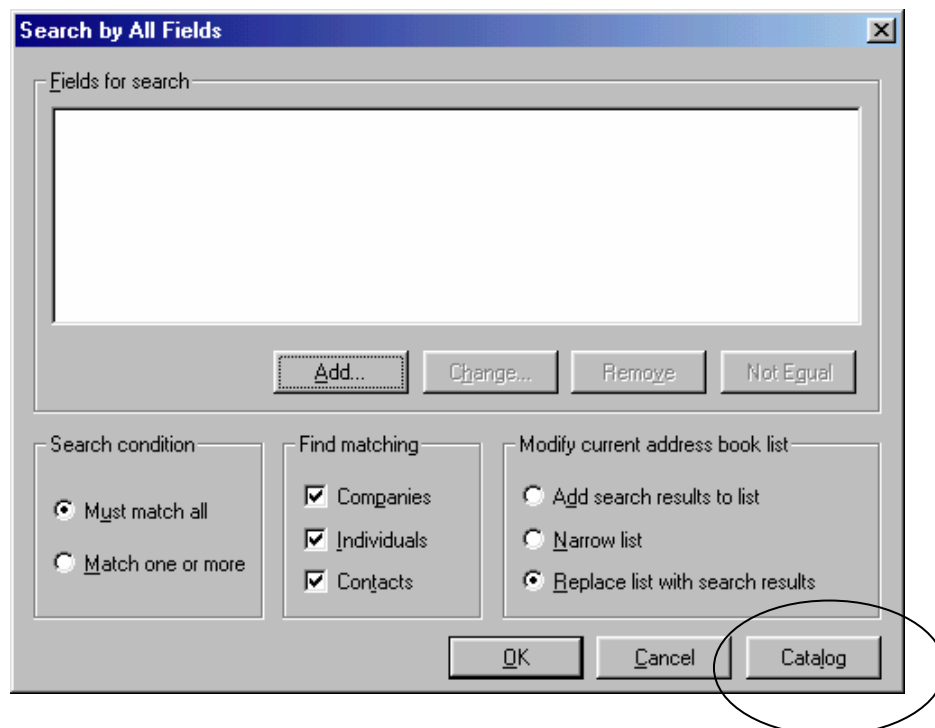
## Catalogs

You may wish to save a complex or regularly used multiple-list search. This can be useful as an alternative to creating a new static list as each time you bring it up, any changes in the lists will be reflected. eg. If you had a list (eg for a conference) that included Federal Court Judges, if you used a Catalog to search for the same lists to invite to something similar, you would pick up changes made to the Federal Court Judges list.

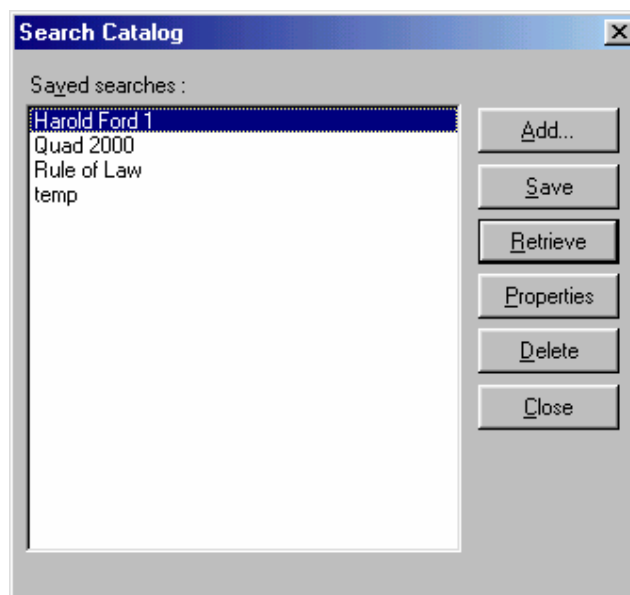
### Retrieving a Catalog

To retrieve a previously saved Catalog you:

- 1 Select *Search: All Fields* and select Catalog.



- 2 Select the search that you want to retrieve

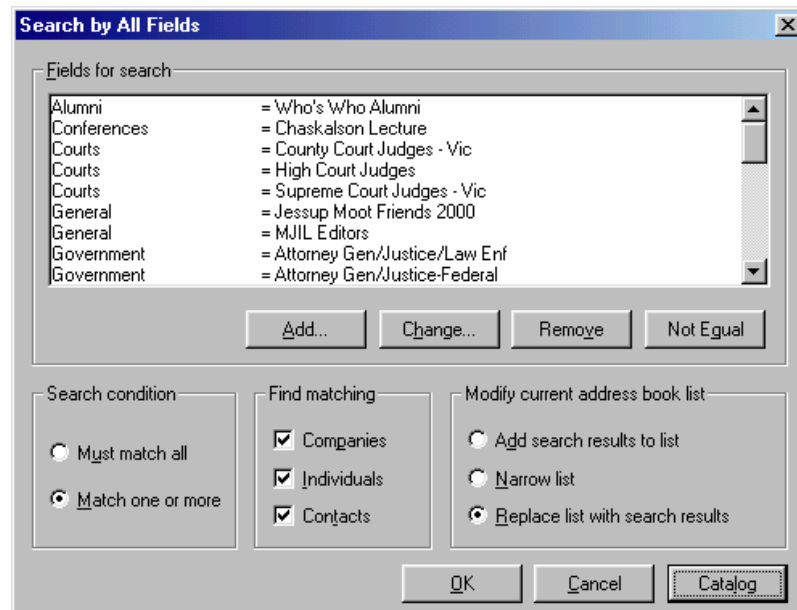


### 3 Click on Retrieve

The saved search will be displayed in the Search All Fields box to be checked. If it is as you wish, click on OK to start the search.

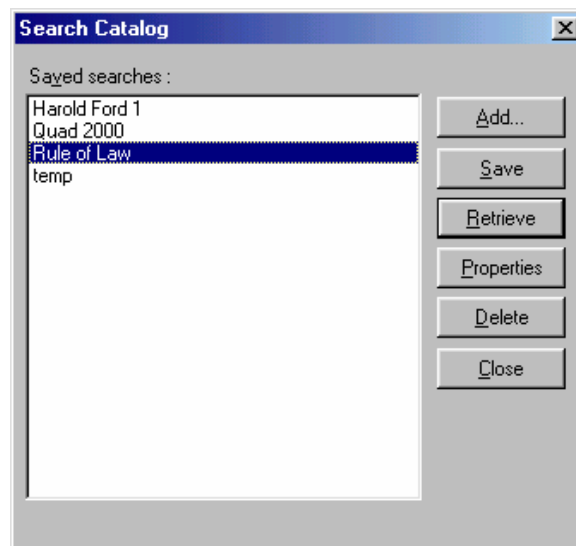
## Creating a Catalog

As catalogs are usually a complex search, use *Search: All Fields* to set up the search you want saved. eg.

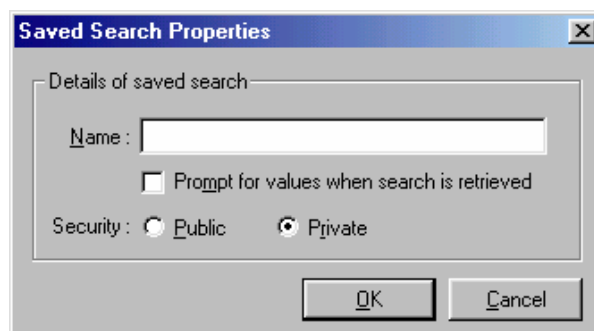


Then:

1. Click on the Catalog button



2. Select *Add*



3. Give the search a name and select if it is to be Public or Private (depending on its usefulness to others) and click OK.
4. You can add to or remove lists from this search and resave it at any time.

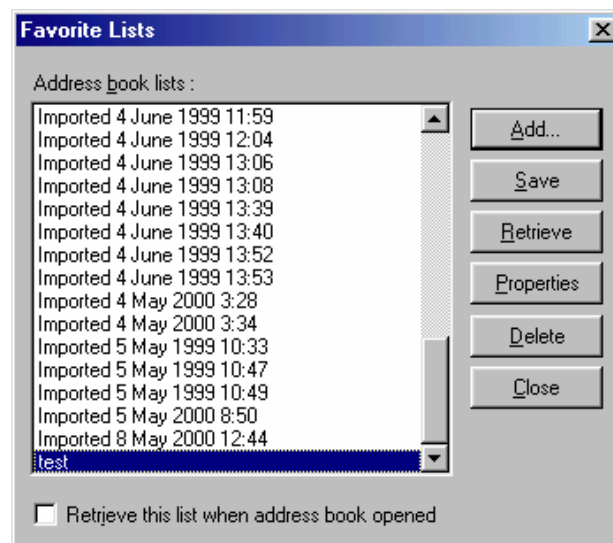


## Saving the List as a Favorite for re-use

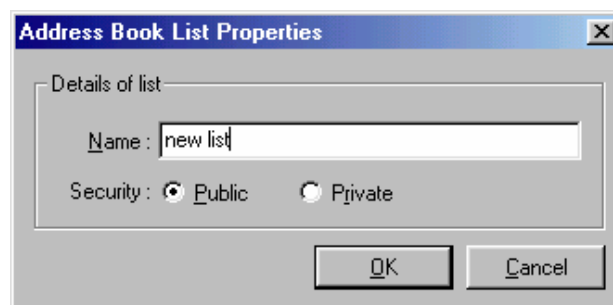
Favorite Lists maintains different static lists of individuals, contacts and companies. You can quickly retrieve, edit, and re-save lists so that they are available for future use.

### Create a New Favorite

- 1 Find a list of entries to be saved as a favourite, refer *Creating a List of Entries* under this section.
- 2 Once the entries have been found, select *View* from the bar menu
- 3 Select *Favorite Lists*. A window showing the Favorites already saved will be displayed.



- 4 Click *Add*. A dialog box will be displayed.



- 5 Enter the name of the list, click either *Public* or *Private* depending on whether the list will be for general use, and *OK*.

### Use a Saved list of Entries from Favorite Lists

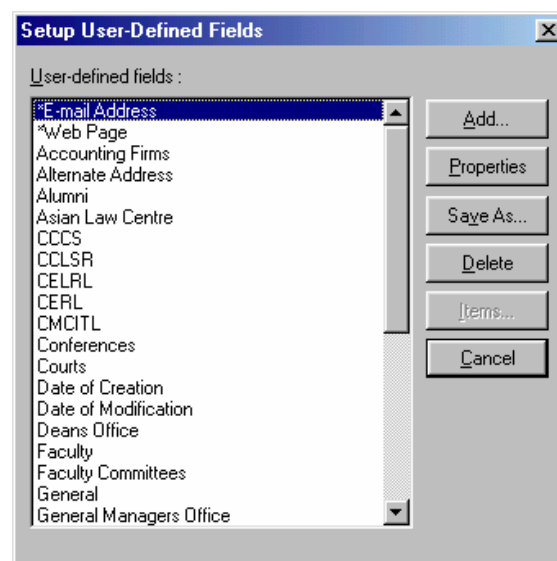
- 1 Select *View* from the bar menu
- 2 Select *Favorite Lists*
- 3 Highlight the list you wish to use and click *Retrieve*

## User Defined Fields

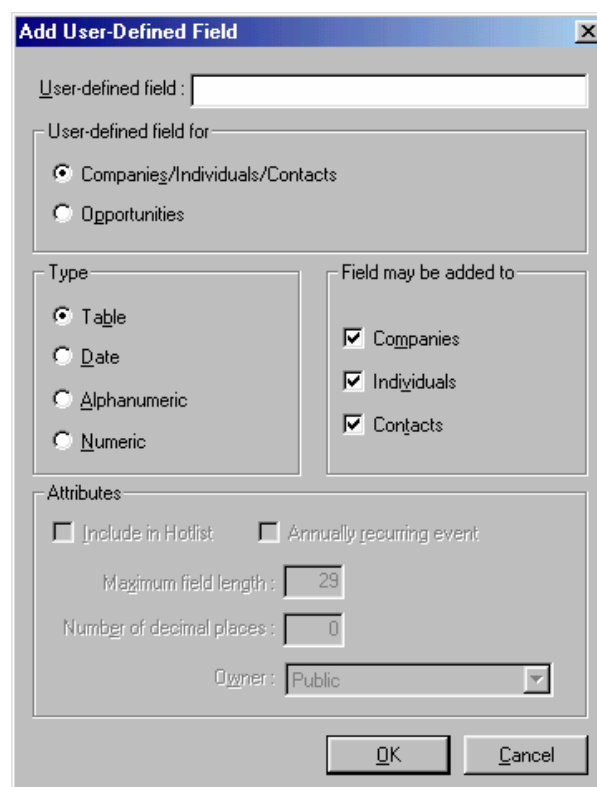
Contacts, companies and individuals can be tagged as having certain characteristics eg. belonging to "Federal Court Judges". This classification is done using "user defined fields". The Law Schools common mailing lists are set up as user-defined fields.

### Setting up a new User Defined Field (Mailing List)

- 1 Click on the *File Menu*
- 2 Select *Set up User-Defined Fields*  
Notice the list of User Defined Fields presently in the Address Book



- 3 Click on *Add*. The Add User Defined Fields dialog box will appear.



- 4      Type the name of the new field. Leave the *Type* selected as *Table*.
- 5      Leave as *Companies, Individuals and Contacts*
- 6      Ensure the owner is set to *Public* if everyone is to see this field. If private viewing only is required then set the owner to a specific group.
- 7      Click *OK*.

You are back in the *Setup User Defined Fields* box.

- 8      Double-click on the name of the user defined field you have just created.  
The *Add Item* dialog box appears. You are now ready to type the itemised list
- 9      Click *Add*,
- 10     Type the name of the first Item, then press OK
- 11     Click *Add*, and repeat for any additional Items.
- 12     Click *Close*

## Adding a Contact to a Mailing List

If the mailing list is first to be created refer to Setting up a new User Defined Field

To add someone to a mailing list:

- 1 Locate the relevant record and double click within the record
- 2 Select the User Defined Fields tab.

The screenshot shows a dialog box titled "2CN" with three tabs: "Basic Information", "User-Defined Fields" (which is selected), and "Mailing Address". Under the "User-Defined Fields" tab, there is a section labeled "User-defined fields" containing a list of text input fields with labels: "\*E-mail Address:", "\*Web Page:", "Accounting Firms:", "Alternate Address:", "Alumni:", "Asian Law Centre:", "CCCS:", "CCLSR:", "CELRL:", and "CERL:". A vertical scrollbar is on the right side of this list. At the bottom of the dialog box are three buttons: "New Field...", "OK", and "Cancel".

- 3 Scroll down to the appropriate category.
- 4 Click inside the text box and a small button with three dots is displayed.
- 5 Click the button. Mailing lists for this category are displayed.

The screenshot shows a dialog box titled "Table Field Values for Current Entry". It has a "Field:" label with "Faculty" entered in the text box next to it. Below this is a list box containing a list of faculty-related categories, each preceded by an unchecked checkbox: "Faculty Assoc Prof & Readers", "Faculty Associate Professors", "Faculty Emeritus Professor", "Faculty Independent Lecturers", "Faculty Lecturers", "Faculty Professorial Associat", "Faculty Professorial Fellows", "Faculty Professors", "Faculty Research Fellows", "Faculty Senior Associates", "Faculty Senior Lecturers", and "Faculty Visiting Fellows". To the right of the list box is a large empty text area labeled "Field values for current entry :". At the bottom are three buttons: "New Value...", "OK", and "Cancel".

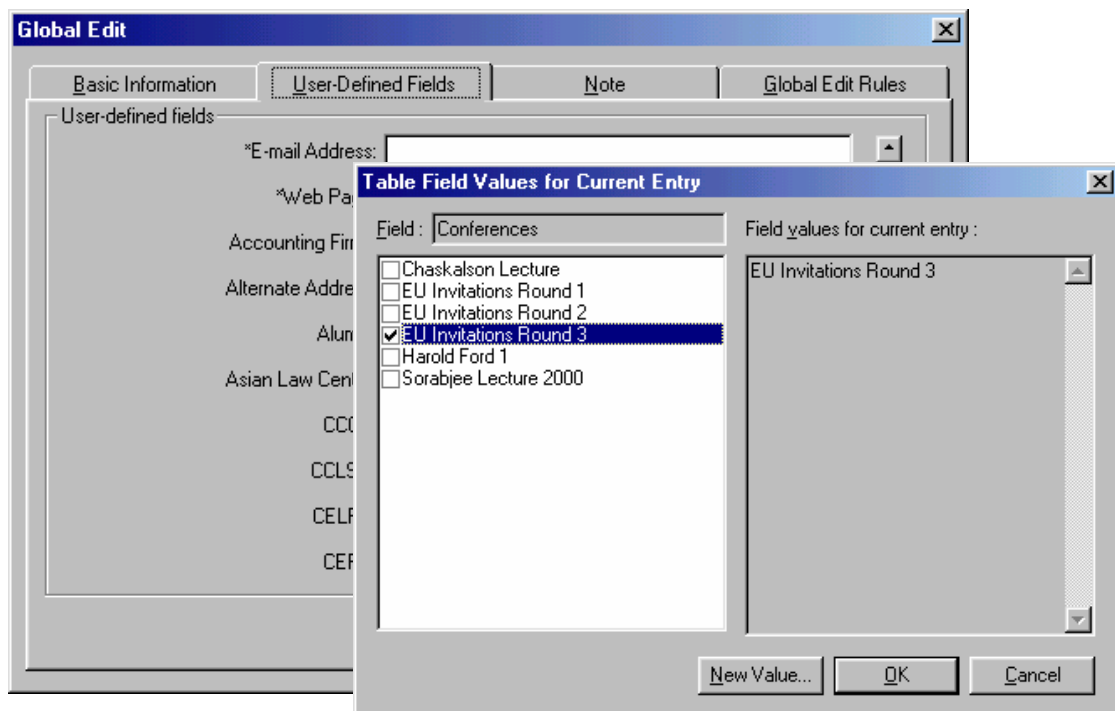
- 6 Select the appropriate options.

## Move Contacts Within a List to a New List

This is done in two stages first contacts are moved to the new list, then the old list is deleted.

### Moving Multiple Contacts to a New List

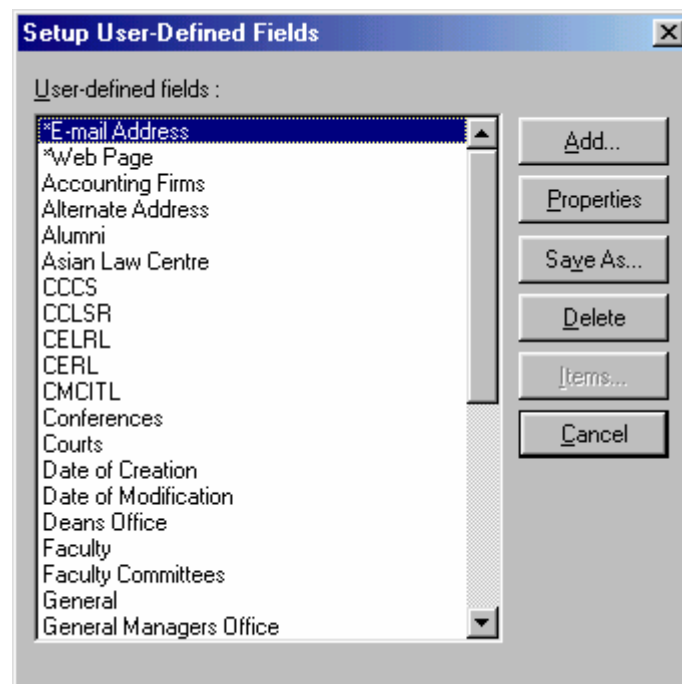
- 1 Create the new list, refer *Setting up a New User Defined Field (Mailing List)*.
- 2 Search for all the records to be moved to the new list, refer *Creating a List of Entries*.
- 3 Select *Edit* from the menu bar
- 4 Select *Global Edit*
- 5 Select *User-Defined Fields* tab



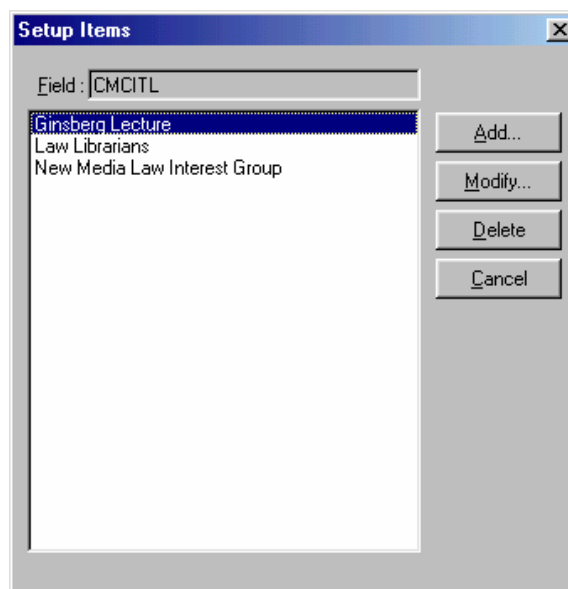
- 6 Click inside the appropriate text box and a small button with three dots is displayed. Click this button. Mailing lists for this category are displayed.
- 7 Select the new mailing list on which all these entries are to be placed. *OK, OK*

## Deleting a List

- 1 Click on the *File Menu*
- 2 Select *Set up User-Defined Fields*



- 3 Select the relevant mailing list name and *Items*.



- 4 Highlight the name of the old list and press *Delete*.

No record will now be held of the list.

## Creating & Editing Entries

### Returned Mail

- A problem we may encounter is that mail will return with a label such as:

John Q. Citizen  
Chief Executive Officer  
Coles Myer  
123 Smith Street  
MELBOURNE 3000

“RETURN TO SENDER - LEFT COMPANY”

The first thing to do in this case is to check if the company still exists at that address. Using the WhitePages online is often the easiest way. [www.whitepages.com.au](http://www.whitepages.com.au)

If the address is still correct, then obviously, this Company still has the position CEO, but we do not know the name of the person filling this position, and thus our mail is returning. Maximizer allows us to delete this entry's name and leave only a position. New mail to this entry should reach its destination, marked simply:

Chief Executive Officer  
Coles Myer  
123 Smith Street  
MELBOURNE 3000

If there is no important position or the returned mail is for an individual, then the lists that they are attached to should be quickly looked at. If they are on Graduate Studies advisory boards or similar, check with the relevant office to make sure there is no new address.

If after doing this checks, there is no further address, then the entry should be deleted.

## Creating a New Entry

New entries to our database are either Individuals, or Contacts to existing Companies or new Companies. For example, if John Citizen, not affiliated with any organization wishes to be added to our Corporate Law Interest Group, he would be added as an Individual. However, if we wish to send mail to Jane Doe, CEO of Acme Inc., she would be added as a contact to Acme Inc.

**Note:** It is important to ensure the entry being added does not already exist in the database. Refer to *Maximizer Layout* and *Searching* if unsure how to locate records.

## Adding a New Company

To add a new company:

- 1 Click in the Address Book window.
- 2 Select Edit - Add from the top menu
- 3 Select Company. A window will be displayed.

**Add Company**

Basic Information    User-Defined Fields    Mailing Address

Name and position

Mr/Ms:  First name:  Initial:  Last name:

Position:  Salutation:

Company and main address

Company:

Dept.:

Division:

Address 1:

Address 2:

City:  St/Prov:

Zip/Postal:  Country:

Phone numbers and phone extensions

1:

2:

3:

4:

IDentification and owner

ID:

Owner:

- 4 Fill in the company information for this new Company's record.



## Adding a Contact to a Company

Locate the relevant company using the Search menu, or if new, enter as a new Company.

- 1 Select the Company by clicking against it in the Address Book window.
- 2 Click in the Contacts window, and press the Insert key on the keyboard.

**Add Contact for F B Marketing Pty Ltd**

**Basic Information** | User-Defined Fields | Mailing Address

**Name and position**

Mr/Ms:  First name:  Initial:  Last name:

Position:  Salutation:

**Company and main address**

Company:

Dept:

Division:

Address 1:

Address 2:

City:  St/Prov:

Zip/Postal:  Country:

**Phone numbers and phone extensions**

1:  Tel:

2:  Fax:

3:

4:

**Identification and owner**

ID:

Owner:

The company details will be displayed but they cannot be changed.

- 3 Enter the contacts details.

The contact may also be added to mailing lists, refer to *Adding a Person to a Mailing List*.

## Adding an Individual

- 1 Click in the Address Book window.
- 2 Select Edit - Add from the top menu
- 3 Select Individual. A window will be displayed.

**Add Contact for F B Marketing Pty Ltd**

Basic Information    User-Defined Fields    Mailing Address

Name and position

Mr/Ms :  First name :  Initial :  Last name :

Position :  Salutation :

Company and main address

Company : F B Marketing Pty Ltd

Dept :

Division :

Address 1 : 17 Lihon Street

Address 2 :

City : LANE COVE St/Prov : NSW

Zip/Postal : 2066 Country :

Phone numbers and phone extensions

1 : (02) 9418 6802 Tel

2 : (02) 9418 7158 Fax

3 :

4 :

IDentification and owner

ID : 000914046282260518645C

Owner : Public

- 4 Fill in the personal information for our new Individual.

You may now wish to add this person to an existing mailing list, refer to *Adding a Person to a Mailing List*.

## Editing an Entry

It may be necessary to change details for a particular person or company, for example if it is discovered they have changed address, or are to be added to other mailing lists. Refer to *Maximizer Layout* and *Searching* if unsure how to locate records.

## Editing a Company's Details

When changing a company's details it is necessary to ensure the company record is the one selected and not the contact's record. If the record is located through a contact, in order to edit the company double click the company name which will be shown as the first field under *Contacts*.

After locating the entry in the database

- 1 Double click on the record and a window showing their details is displayed for editing. Note that when a company is selected for editing, the *Name and Position* areas are greyed out, i.e. they cannot be edited but the Company details are available for editing.

The screenshot shows a dialog box titled "Deacons" with a close button (X) in the top right corner. The dialog is divided into three tabs: "Basic Information", "User-Defined Fields", and "Mailing Address". The "Basic Information" tab is active. It contains several sections:

- Name and position:** This section is greyed out. It includes fields for "Mr/Ms:", "First name:", "Initial:", "Last name:", "Position:", and "Salutation:".
- Company and main address:** This section is active. It includes a "Company:" dropdown menu with "Deacons" selected, a "Dept.:" text field, a "Division:" text field, "Address 1:" (containing "GPO Box 4592"), "Address 2:" (empty), "City:" (containing "MELBOURNE"), "St/Prov:" (containing "VIC"), "Zip/Postal:" (containing "3001"), and "Country:" (empty).
- Phone numbers and phone extensions:** This section is active. It includes four rows of fields: "1:" (containing "(03) 9235 0235" and "Main"), "2:" (containing "(03) 9235 0299" and "Fax"), "3:" (empty), and "4:" (empty).
- Identification and owner:** This section is active. It includes an "ID:" text field (containing "7083") and an "Owner:" dropdown menu (containing "Public").

At the bottom right of the dialog are "OK" and "Cancel" buttons.

If the company details are greyed out then a contact rather than a company record has been selected. Move to the company record, which will be the first name under the *Contacts* area.

If the company is to be added to a mailing list refer to *Adding an Entry to a List* later in this section.

## Editing a Contacts Details

Locate the record to be edited and double click to display the details of the record. The Name and Position will be available for editing, the Company details will be greyed out. If the contact is to be added to a mailing list refer to *Adding an Entry to a List* later in this section.

## Editing an Individual's Details

Locate the record and double click to display the editing window. With an individual, all details will be available for editing. If the individual is to be added to a mailing list refer to *Adding an Entry to a List* later in this section.

## Adding an Entry to a List

- 1 Locate the record and double click to bring up the editing window.
- 2 Select the *User Defined Fields* tab.

The screenshot shows a window titled "D'Andrea, Joanne M." with three tabs: "Basic Information", "User-Defined Fields" (selected), and "Mailing Address". The "User-Defined Fields" tab contains a list of fields with corresponding text boxes:
 

- \*E-mail Address:
- \*Web Page:
- Accounting Firms:
- Alternate Address:
- Alumni:
- Asian Law Centre:
- CCCS:
- CCLSR:
- CELRL:
- CERL:

 At the bottom of the tab are three buttons: "New Field...", "OK", and "Cancel".

- 3 Scroll down to the appropriate category.
- 4 Click inside the text box and a small button with three dots is displayed.
- 5 Click the button. Mailing lists for this category are displayed.

The screenshot shows a dialog box titled "Table Field Values for Current Entry". It has a "Field:" label with a text box containing "CCLSR". To the right of this is a label "Field values for current entry:" followed by a large empty text box. On the left, there is a list of checkboxes, each followed by a category name. The first item, "IG CL/12/2 & 21/3 Acc", is selected. The other items are:
 

- IG CL/8/7/96 Romano
- IG CL/AcadVic/inters/os
- IG CL/Advisory BoardG/d
- IG CL/Asc - Chairman Off
- IG CL/Asc - Regional Off
- IG CL/Aust Ins Co Directr
- IG CL/Aust Stock Exchange
- IG CL/Banking & Finance
- IG CL/Buslaw Division A-g
- IG CL/CIta
- IG CL/Co & Securities A/c
- IG CL/Combined List
- IG CL/Company Secretary
- IG CL/Corp Accountants
- IG CL/Corp Law Academics
- IG CL/Corp Law/Overseas

 At the bottom are three buttons: "New Value...", "OK", and "Cancel".

- 6 Select or de-select the appropriate options.

## Combining Entries

Sometimes we may find that there are two entries for a single Individual, Company or Contact. In this case, it is better that we combine the two entries. Combining two Individuals or Contacts (Contacts must be in the same company) will result in a new Individual or Contact who is subscribed to all of the lists the two old entries were subscribed to.

When we combine Companies, the result is a one Company with all of the Contacts from all of the combined Companies. We may wish to merge Companies if we find two entries for the same *branch* of the same Company. An example is “University of Melbourne” and “The University of Melbourne”. Be careful: many Companies have multiple branches! Make sure that the address details of the Companies to be merged are identical.

To merge two records:

- 1      Select both entries by clicking in the grey box to the left of the name, in the Address Book window (where the arrow is). This box will now turn dark.
- 2      Note that after selecting the entries to be merged (the last one selected will still have the arrow next to it, **this is the name that will be retained for the new record**).
- 3      Click on *Edit*
- 4      Select *Combine Selected Entries*. Now the record with the arrow next to it will contain all of the information from the records added together.  
  
Then delete the old records by first deselecting everything as Maximizer deletes all selected entries.
- 5      Click on *Edit*.
- 6      Select *Deselect All*
- 7      Select and delete each old entry in turn.

## Moving Entries

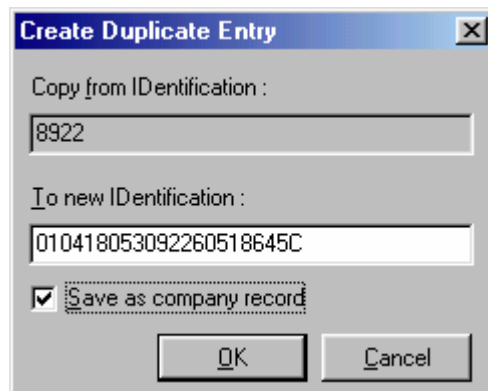
It may be necessary to move a Contact from one Company to another. Often we receive letters from a person stating they have resigned from one firm and moved to another. In this case, we wish to move their record. After finding (or creating) the firm they are moving to, we must create a new Contact in that Company. Maximizer has no support for easily moving a record, so we must do this manually.

- 1      Locate the old record
- 2      Print its details. Click on *File*
- 3      Select *Print*
- 4      Select *Detailed Report*. Print this entry only.
- 5      Delete the old entry – this contact only, not the company.
- 6      Locate the new entry we created under the person's new Company, and edit that Contact. Add their subscriptions to mailing lists using the User Defined Fields tab described in as before under *Adding an Individual*.

## Change an Individual to a Company

It may be necessary to change an individual to a company if there are other contacts to be assigned to that company

- 1 Locate the individual's record and add a company name to the details
- 2 Go into your *Edit* menu
- 3 Select *Create Duplicate* entry



- 4 Select *Save as a Company Entry*

This will create a new Company record with the original Individual now as a Contact to the new Company.

- 5 Delete the original (Individual) record
- 6 Do a search for the Company Name of the new record.
- 7 If the company already existed, combine the new Company into the original Company. See *Combining Entries* for more information.



## Deletion of Records

Prior to deleting records it is wise to deselect all entries.

- 1       Select *Edit*
- 2       *De-select All*. If this option is greyed out then no records are selected

To delete the records:

- 3       Select the appropriate records by clicking in the grey box to the left of the name in the Address Book window (where the arrow is). This box will now turn dark. If selected in error, click again to de-select.
- 4       Press the Delete key or select *Delete Selected Records* from the *Edit* menu.
- 5       Note the correct number of records for deletion is shown, *OK*.

**NOTE:** Deleting a Company will remove all Contacts within that Company.

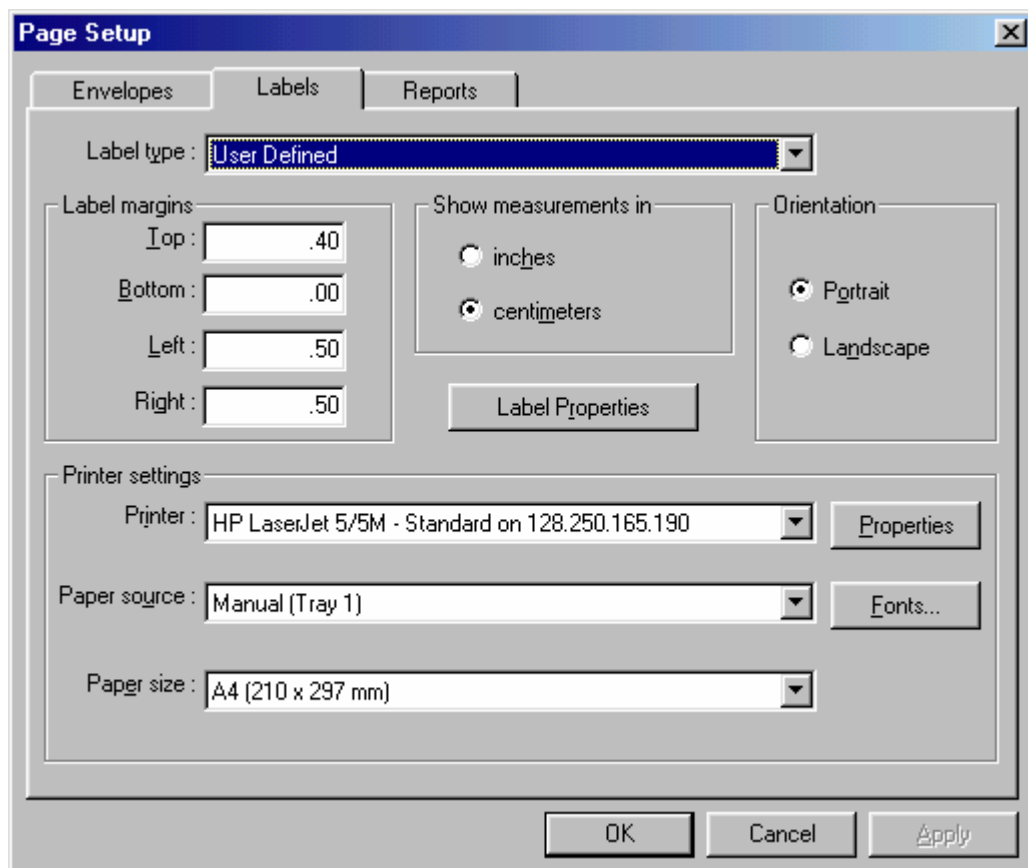
## Printing

### Printing Order

The order of the contacts when printing depends on the sorting order of the column. Refer to *Sorting Entries for Viewing or Printing* under *Maximizer Layout* Section 1.

### Setting up Label Preferences

- 1 Go into the *File* menu
- 2 Select *Page Setup*. The Page Setup dialog box will appear in front of you

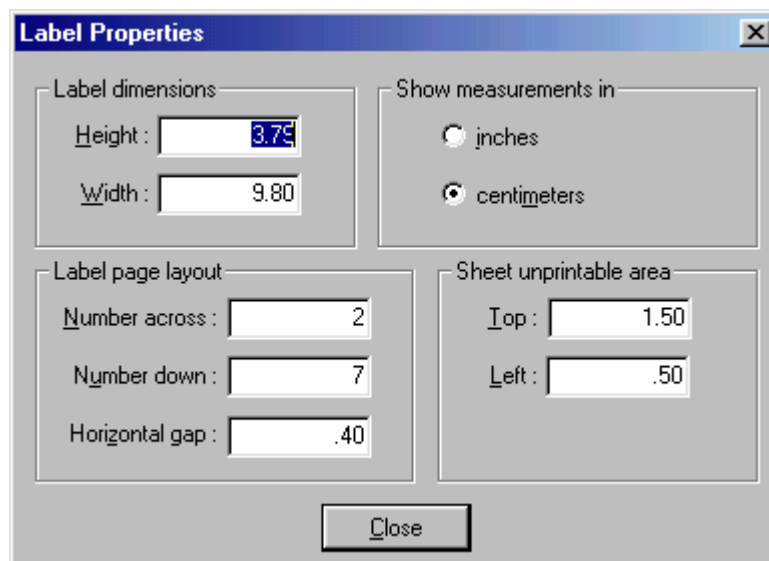


- 3 Click on the *Labels* Tab
- 4 In the Label Type dialog box, select the appropriate label type, by clicking on the down arrow within the Label Type field (this label number type is found on the box of labels which you would have purchased ie Laser (4" x 1" – 20/sheet). Or select *User Defined*.
- 5 Click on the Radio button to show measurements in *centimetres*
- 6 Ensure that the orientation is set to *Portrait*
- 7 Check the label margins are correct

- 8 Ensure that you have a printer selected. To select a printer, click on the down arrow next to the printer dialog box, this will bring up a list of all available printers. Choose a printer from the pull down list in the printer field
- 9 Ensure your paper source is correct.
- 10 Ensure the Paper size is set to A4
- 11 You can change the font size by clicking on the fonts button and adjusting them accordingly

If you have selected user defined labels you need to check the *Label Properties*

- 12 Click *Label Properties*



- 13 When measurements are set to match your labels (above is for 14 per page Avery labels) click *Close*
- 14 Once you have made all of these alterations, click on the *Apply* button

## Printing a Label for a single entry

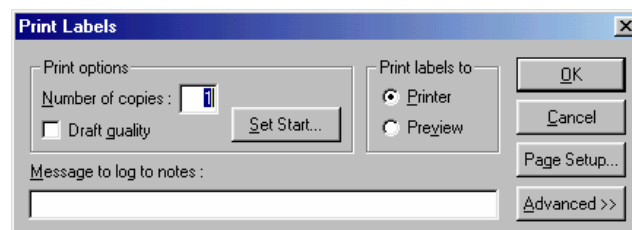
- 1 Find the entry for which the label is required.
- 2 Do a right mouse click and select *Print*, then *Label*. This will bring up the print label dialog box selection prints a label for the record that you wish to print out - only. *NB:* You could also select the Print a Label Icon from the Action Bar for the same result.
- 3 Click *Set Start* and select another starting position on the page of labels. Click *OK* when done.
- 4 In the Print Label Window you have the option of logging a message to the Contact's notes.
- 5 Click *Advanced* to add additional text to the label.
- 6 Select the *Preview* radio button, then the *OK* button.
- 7 A dialog box will appear asking you if you wish to print out all entries in the list, or the current highlighted entry. Select *Current Entry*.
- 8 You will then be toggled over into *Preview* mode.
- 9 Click on the label to zoom in. Click *Close*.

## Printing Labels for Multiple Entries

- 1 Create a list with the entries required. Refer to *Creating a List of Entries* if unsure how to do this.
- 2 Click the *Printer* icon on the *Standard Toolbar* or *File* and *Print*



- 3 Select *Labels*.



- 4 Select *Set Start* if necessary.

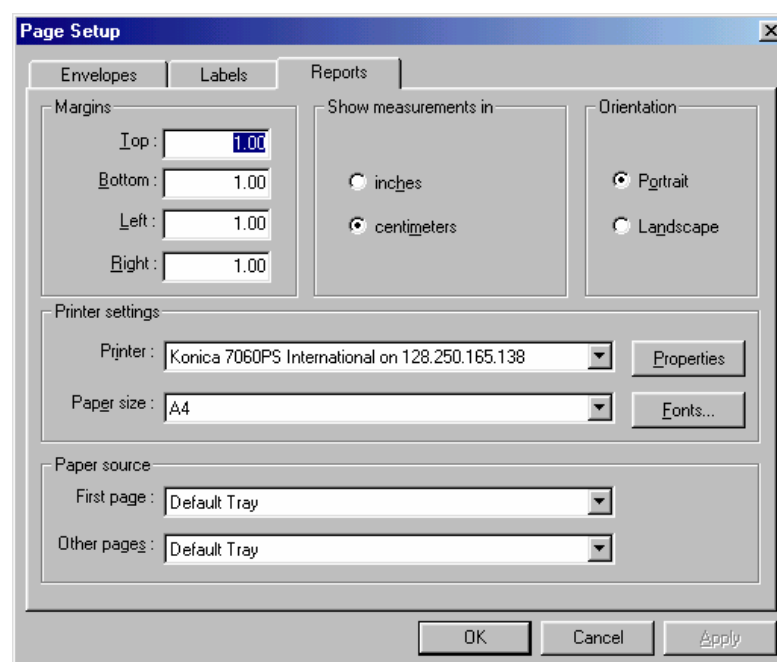


- 5 Click *Advanced* and Type an additional text line if required
- 6 Enter a *Message to Log to Notes* if required.
- 7 Click *Page Setup* and make sure that a printer is named in the printer selection field.
- 8 Click *OK*.
- 9 Select *Print Labels to Preview* to view your settings.
- 10 A dialog box appears for you to select the current entry or all entries.
- 11 Select *All Entries* to preview the label for each person in the Address Book window list.
- 12 Click on a label to zoom in. Click *Print*.

## Setting Report Defaults

The page settings for the report may be set at the time of printing through *Page Setup* or through preferences.

- 1 Select *File* from the bar menu
- 2 Select *Page Setup*
- 3 Click on the *Reports* tab
- 4 Make the appropriate changes
- 5 Click on *Apply* to save the changes



- 6 Click *OK* when finished.

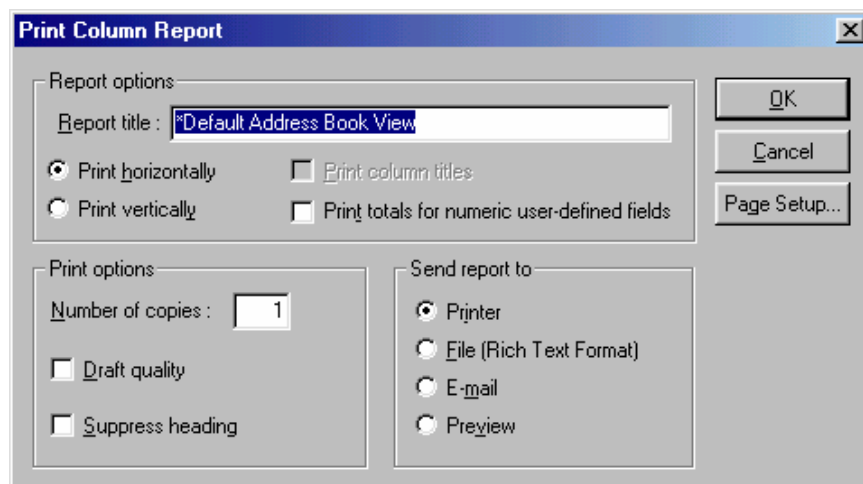
## Printing Column Reports

The format for a column report is set up in the Address Book window using the column setup.

- 1 Select the column setup required in the Columns section at the top of the Address Book window. To create a new column setup refer to *Create a New Column Setup*



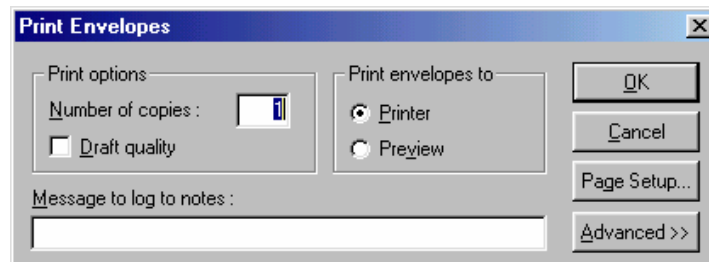
- 2 Select *File*
- 3 Select *Print*
- 4 Select *Column Report*



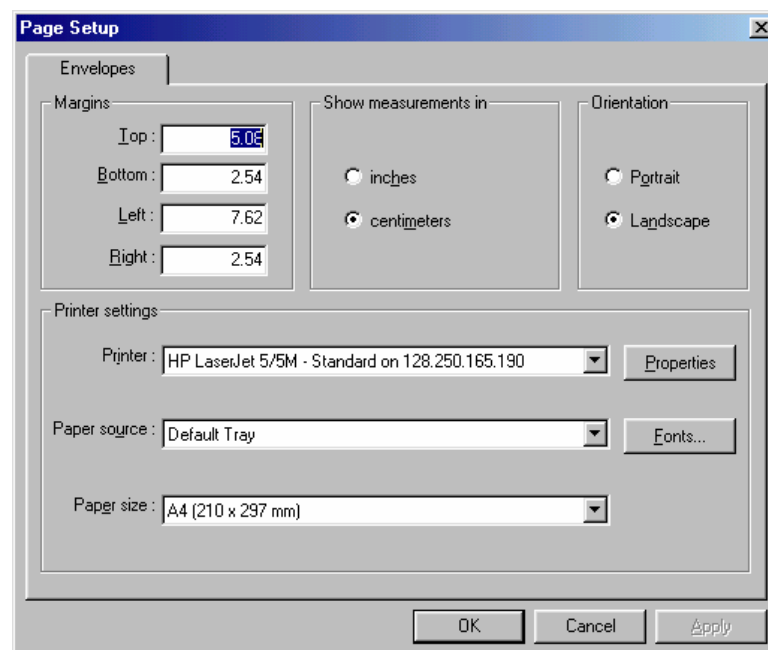
- 5 The report title will show which column setup is selected. To have your own report heading type in what you wish to appear at the top of the report. Alternatively click *Suppress heading* to prevent the report title from printing.
- 6 Select *Preview* to check report format.
- 7 If report is as required select *Print*

## Printing Envelopes

- 1 Create a list with the entries required. Refer to *Creating a List of Entries* if unsure how to do this.
- 2 Click the *Printer* icon on the *Standard Toolbar* or *File* and *Print*
- 3 Select *Envelopes*



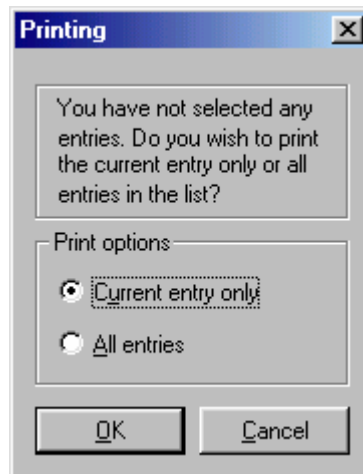
- 4 Click *Advanced* and Type an additional text line if required
- 5 Enter a *Message to Log to Notes* if required.
- 6 Click *Page Setup*



- 7 Make sure that a printer is named in the printer selection field and that paper size shows Envelope DL.
- 8 Click *OK*.
- 9 Select *Print Envelopes to Preview* to view your settings.

A dialog box appears for you to select the current entry or all entries.

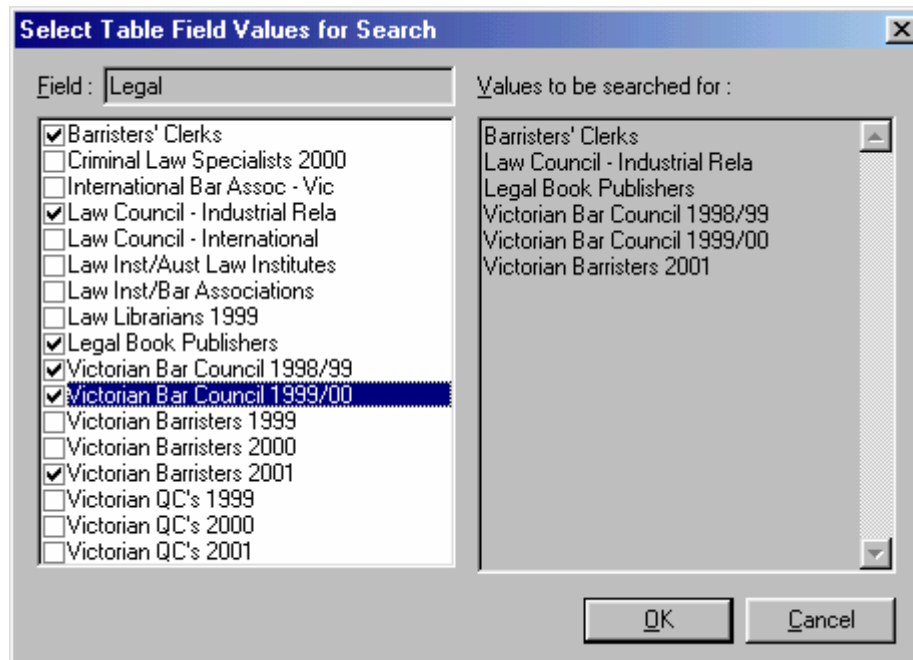




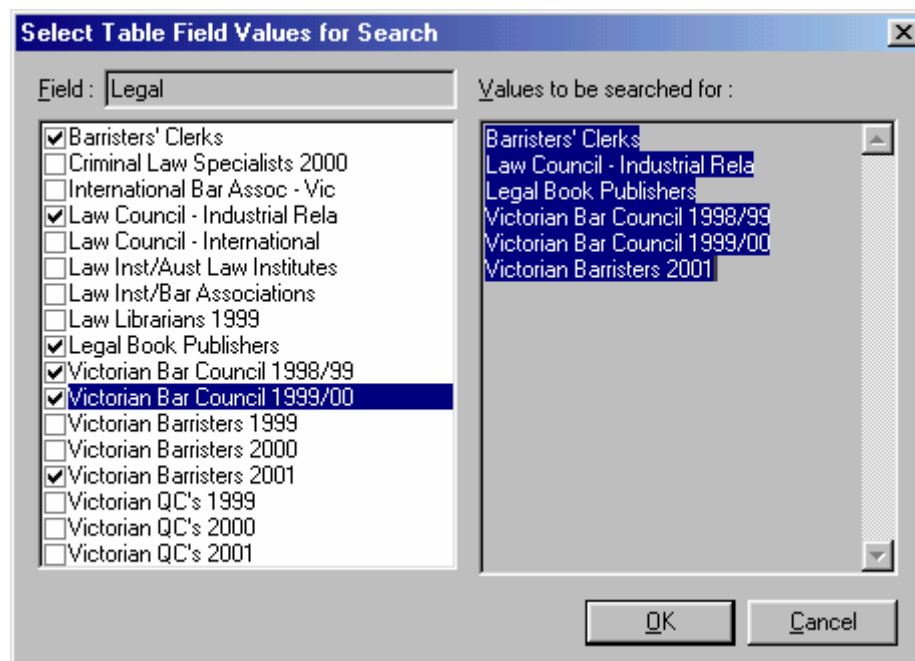
- 10      Select *All Entries* to preview an envelope for each person in the Address Book window list.
- 11      Select *Print*

## To produce reports of Lists from Maximizer

1. Open the Search All Fields Box
2. Tick/Select the lists that you want to put into a report.



3. In the grey right hand side box, you can highlight the selected lists.



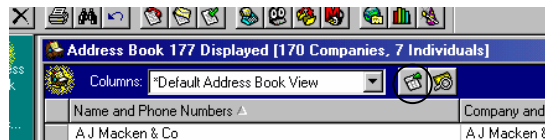
4. At this point you can copy (Ctrl - C) and paste (Ctrl - V) this information into a word document for further formatting/editing.

## Columns

### Create a New Column Setup

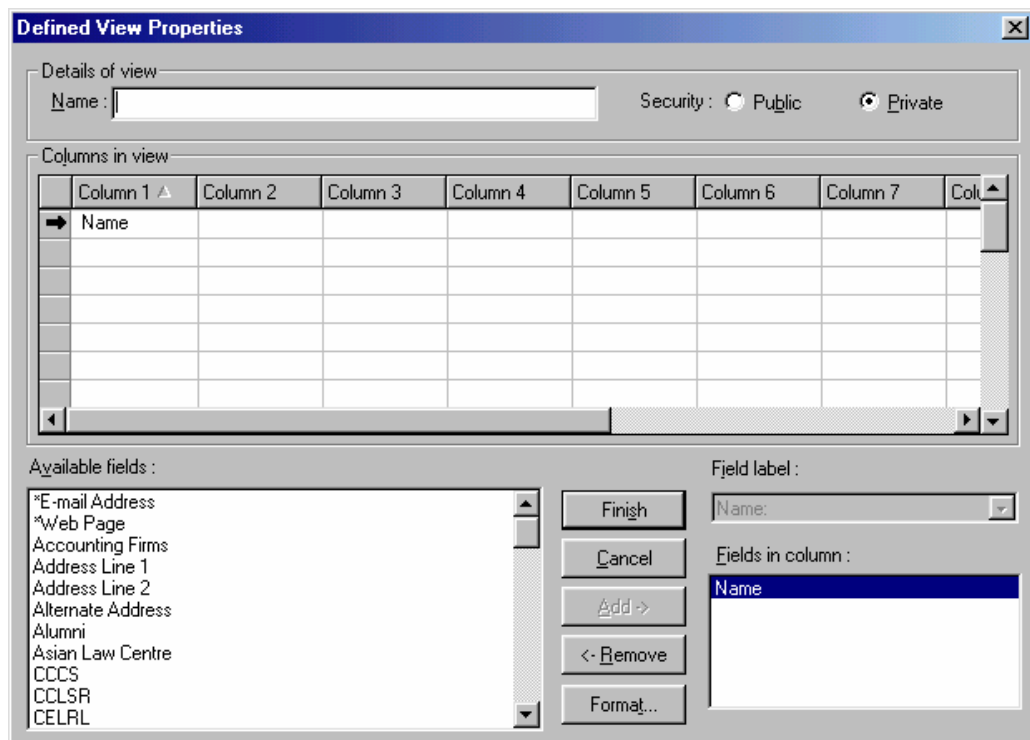
The Column Setup icon allows you to change the attributes of a way a column is set up and viewed within the Address Book layout. For instance, this would be useful if you wanted to display identification and security numbers in the Company Information View layout.

- 1 Click on the *Column Setup Icon* located next to the *Column View* field



The Column Setup dialog box will appear.

- 2 Click *Add*



- 3 In *Details of View*, type in the new name of the Column being created
- 4 Double Click on *Column 1* and type in the heading, change the Column Width as appropriate
- 5 Double Click on *Column 2* and additional columns, enter headings and create appropriate widths. Continue as required with other columns.
- 6 Click back on the first column heading.
- 7 Move to the *Available Fields* list, scroll down and locate the fields required for this column and click *Add*.

- 8 In the *Field label*, click blank
- 9 Add the required fields to each of the created columns in turn.
- 10 Then click *Finish*

You will then be taken back to the Column Setup dialog box with your Column View highlighted.

- 11 Click *Use Now*, then click *Close*

You will see your new view displayed in your current address book entry

## **Edit a Column View**

If you wish to Edit the View you have created, click on the Column Setup icon again, highlight the name of your view and click on the Properties button.

Make any changes required.

## **Delete an Existing Column View**

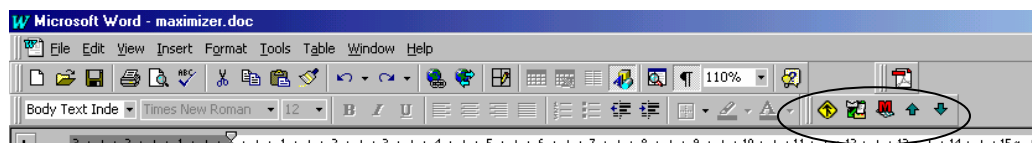
Click on the Column View Icon, and highlight the appropriate view

Click Delete, OK, OK and then Close.

## Mail Merge

### Maximizer's Link with Word

Maximizer 97 has a “link” with Microsoft Word, which enables you to merge letters which have been set up in Microsoft Word with your Maximizer Address Book entries. When you install Maximizer 97 software, it will automatically install these “links” into your Microsoft Word program. When you start Microsoft Word, your screen will appear with 5 extra icons sitting underneath your standard toolbar (pictured below). These icons are used when merging documents. Holding your mouse over the button will display its name.

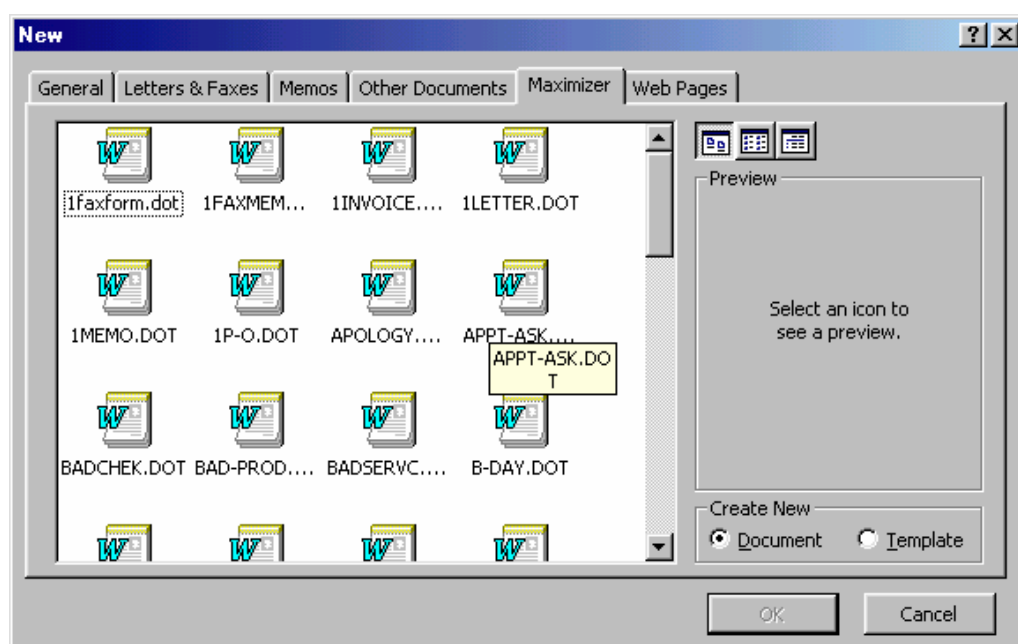


### Create a New Template in Word for Maximizer

To create a new template select a template similar to that you wish to create, make your changes and then save it under a new name.

If it is available, click on the Microsoft Word Icon situated on the Maximizer Toolbar or else open Word from your desktop.

- 1 Within Word, go into your *File* menu and select *New*. A New dialog box will appear in front of you.
- 2 Click on the *Maximizer* Tab. A selection of icons will appear in front of you. You can see them all by scrolling down the list.



- 3 Click on the *Template* button under *Create New* and select an icon.

- 4 The template will open in front of you with the address details for the current record being whatever was selected in Maximizer. (NB: to display the field codes, press ALT F9 on your keyboard)
- 5 Change any detail or fields as required. Refer to *Inserting a New Field into an Existing Document* if necessary.
- 6 Go into your *File* menu and select *Save As*. Save under Templates, under Maximizer if you wish this template to appear under your Maximizer tab. File will be automatically saved as a template, i.e. with an extension of dot, if it was opened as a template.
- 7 Go back to your *File* menu and select *Close*

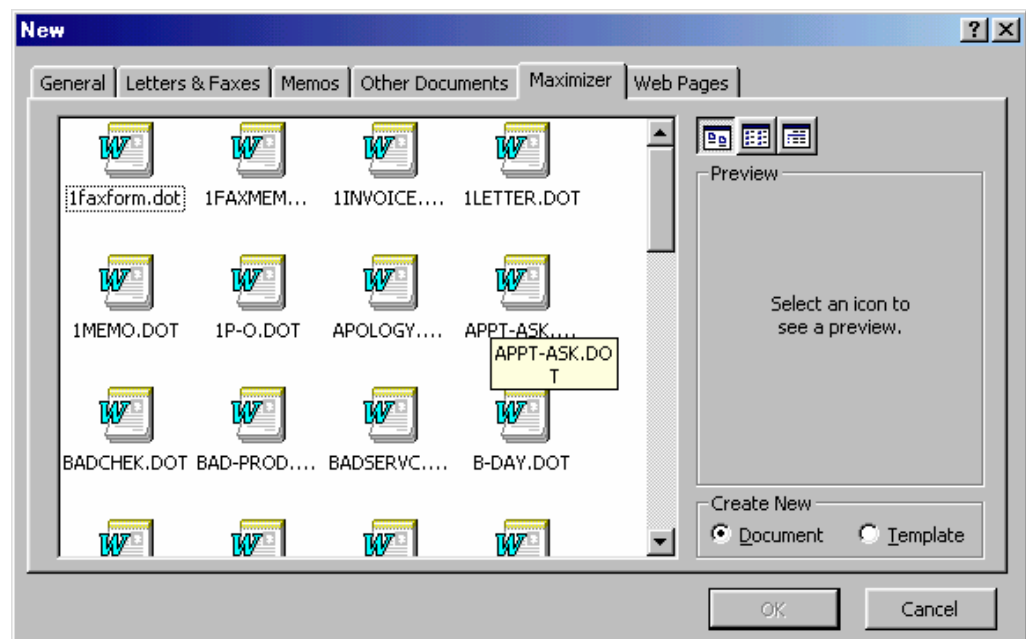
### Inserting a New Maximizer Field into an Existing Document

- 1 Open a saved document.
- 2 Click on your Insert Merge Field icon
- 3 An Insert Merge Field dialog box will appear in front of you. Scroll down the list and highlight the field required, and then click ok.
- 4 Continue until all the required fields have been entered into your document.
- 5 Select *File*, then *Save As*.

## Mail Merge Documents using Word and Maximizer

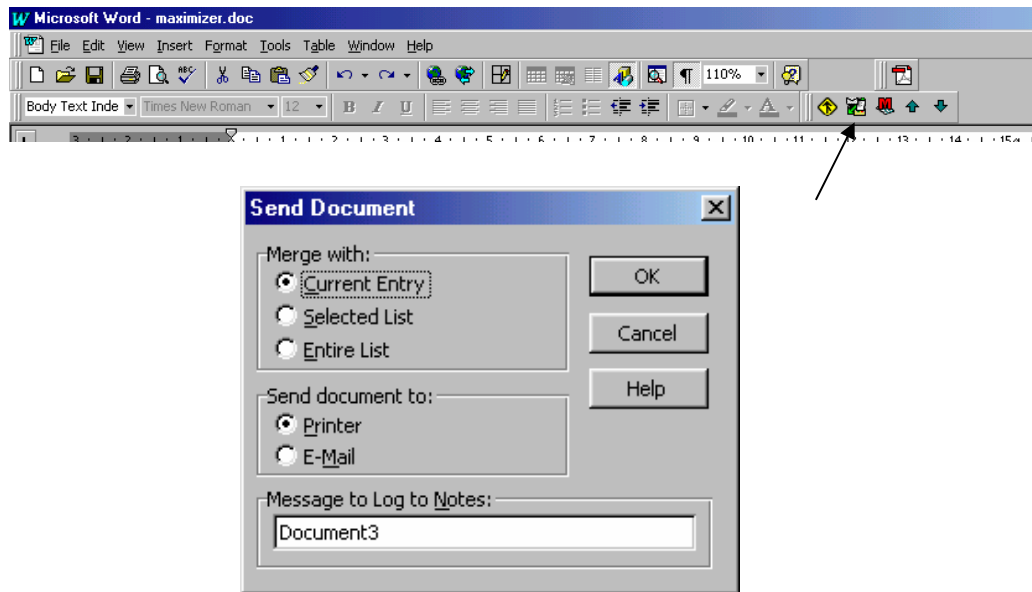
If a new template is required refer to *Create a New Template in Word* first.

- 1 Ensure that you have your Maximizer database open and the appropriate records are listed or selected.
- 2 If it is available, click on the Microsoft Word Icon situated on the Maximizer Toolbar or else open Word from your desktop.
- 3 Within Word, go into your *File* menu and select *New*. A New dialog box will appear in front of you.
- 4 Click on the *Maximizer* Tab. A selection of icons will appear in front of you. You can see them all by scrolling down the list.



- 5 Select an icon.
- 6 The template will open in front of you with the address details for the current record being whatever was selected in Maximizer. (NB: to display the field codes, press ALT F9 on your keyboard).

- 7 Click the *Send Document* button on the Maximizer toolbar.



- 8 Select the entries with which you wish to merge and whether it will go to the printer or email. Enter a relevant message to be logged to the contact records or delete the message. Click *OK*.

No preview is provided when merging through Word, it is necessary to use the merge facility within Maximizer Editor if a preview is required.



## Mail Merge Name Tags and Place Cards Using Word

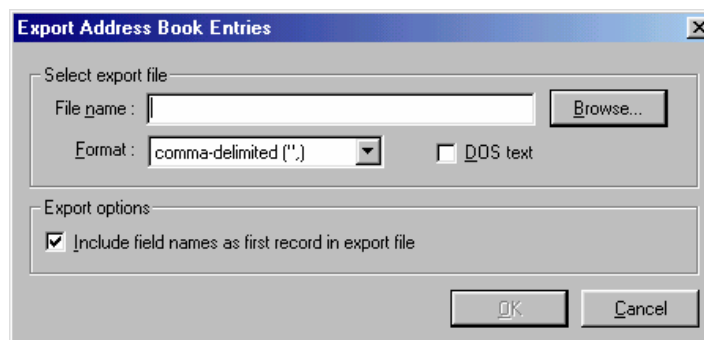
There are several parts to this process.

- 1 A list of records are found in Maximizer
- 2 The records are exported to a Text File
- 3 A document template is created in Word
- 4 The text file is merged with the document in Word

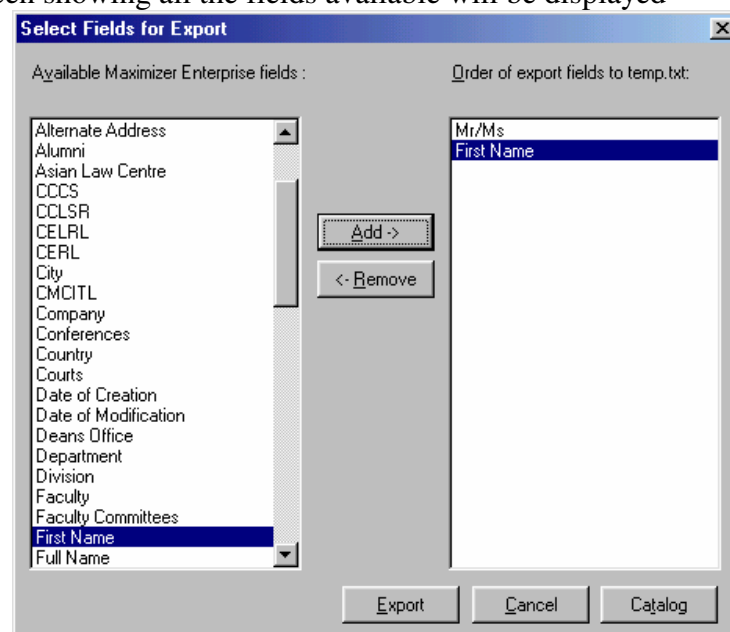
To create a list of records in Maximizer refer to *Creating a List of Entries* under *Mailing Lists*

### Export Entries

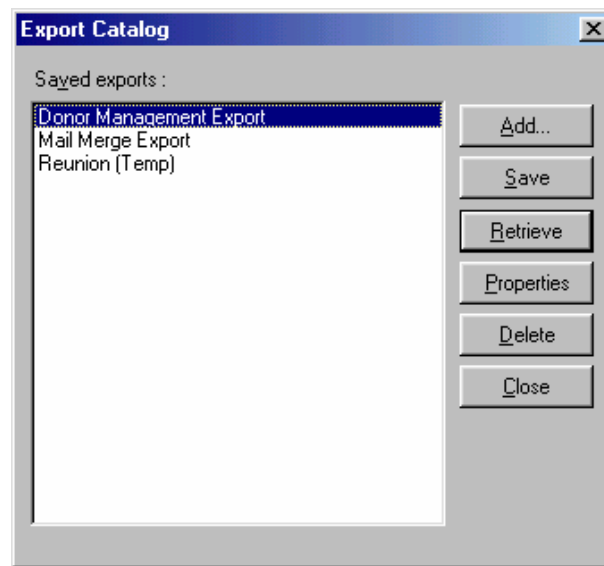
- 1 Select the entries to be exported
- 2 Select *File*
- 3 Select *Export Address Book Entries*



- 4 Enter path and name or use the *Browse* option. Make sure *Include field names* is selected, *OK*.
- 5 A screen showing all the fields available will be displayed



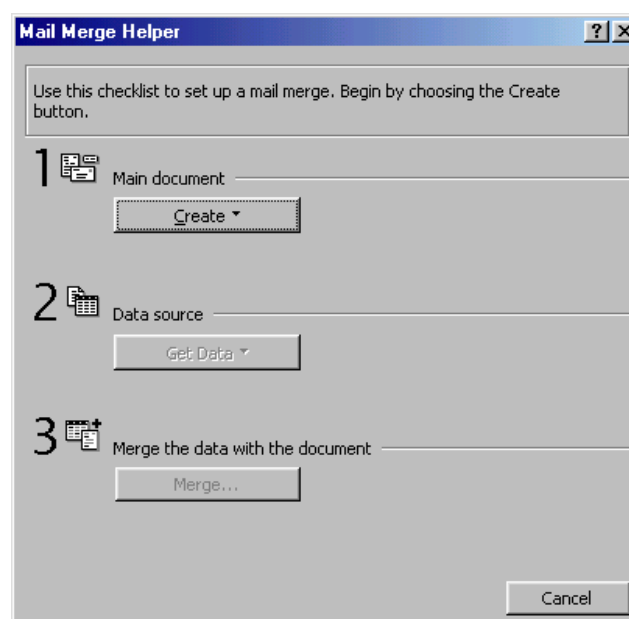
- 6 You can select the fields that you wish to export manually at this point or you can Click *Catalog* to bring up previously saved export lists. The saved lists will be displayed.



- 7 Highlight *Mail Merge Export* and then click *Retrieve*. If this list is not shown, create by selecting the relevant fields in (5) above and save under *Catalog*.
- 8 Click *Export* and selected records will be saved to a text file.

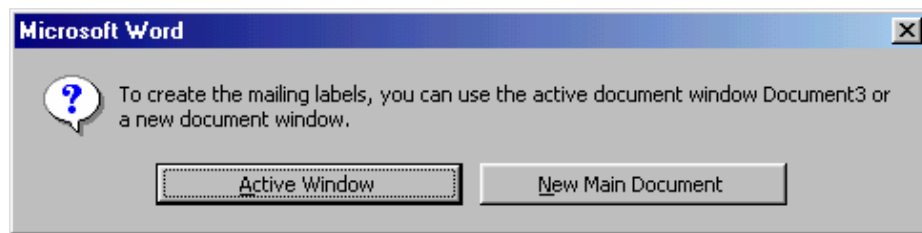
## Create Document Template in Word

- 1 Click *Tools* from the bar menu
- 2 Select *Mail Merge*

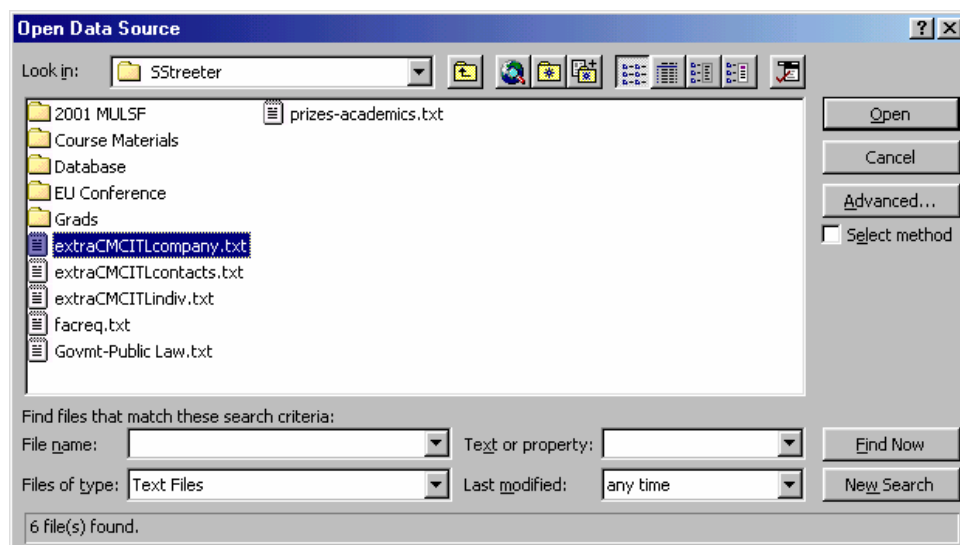


- 3 Click *Create* and select *Mailing Labels*

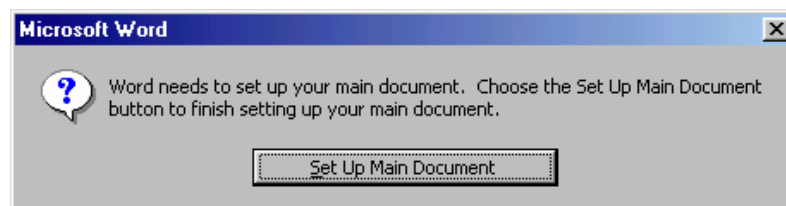
- 4 Select *Active Window* to use current document if blank or *New Main Document* if you wish to keep the current one intact.



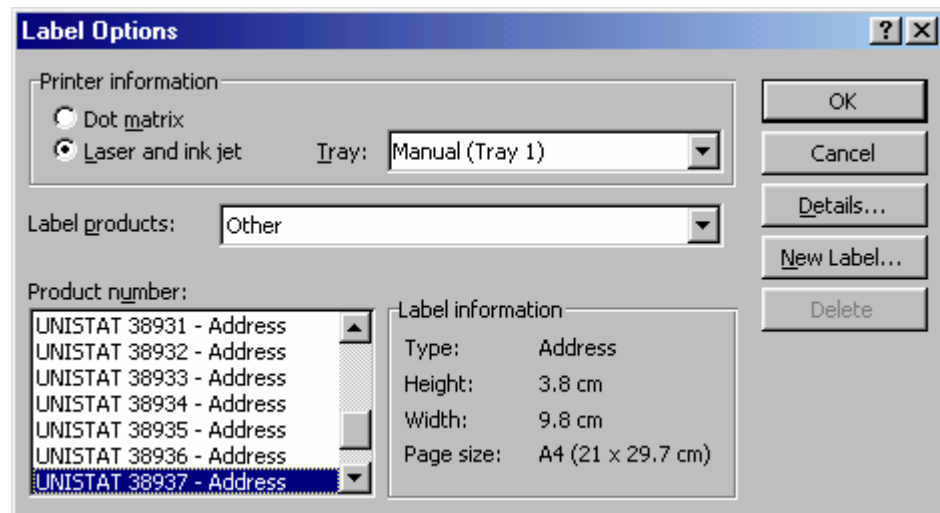
- 5 Next Click *Get Data* and select *Open Data Source*
- 6 Locate the text file saved in your export. Ensure that *Files of Type* are shown as Text Files (\*.txt). Click *Open*



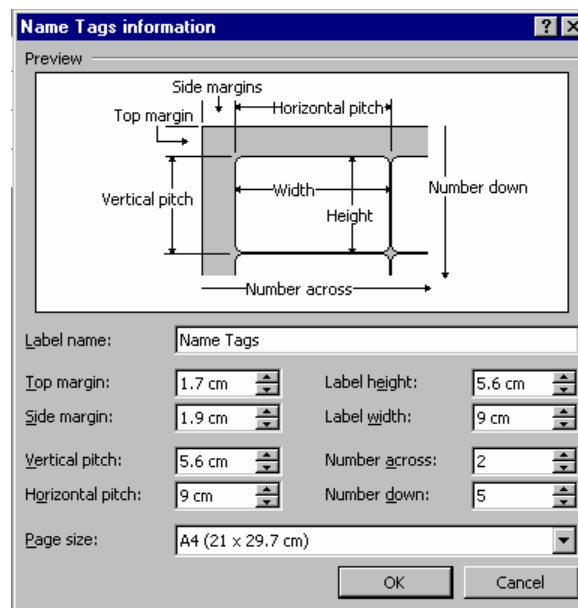
- 7 Word will now ask you to finish setting up your main document.



- 8 A label options dialog box will be displayed. Select the tray used for the labels. Select *Avery A4 and A5 sizes* as the Label Products. Select *Name Badge* under the Product number for Name Tags or a suitable selection for Place Cards.

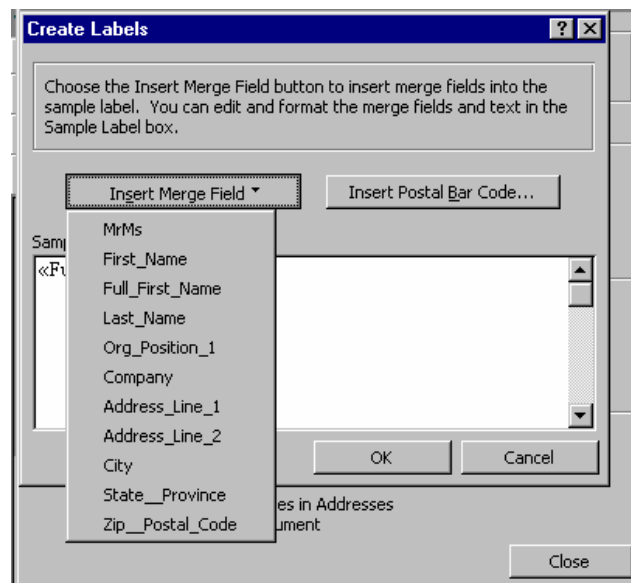


- 9 To change the measurements of the label Click *Details* or *New Label*

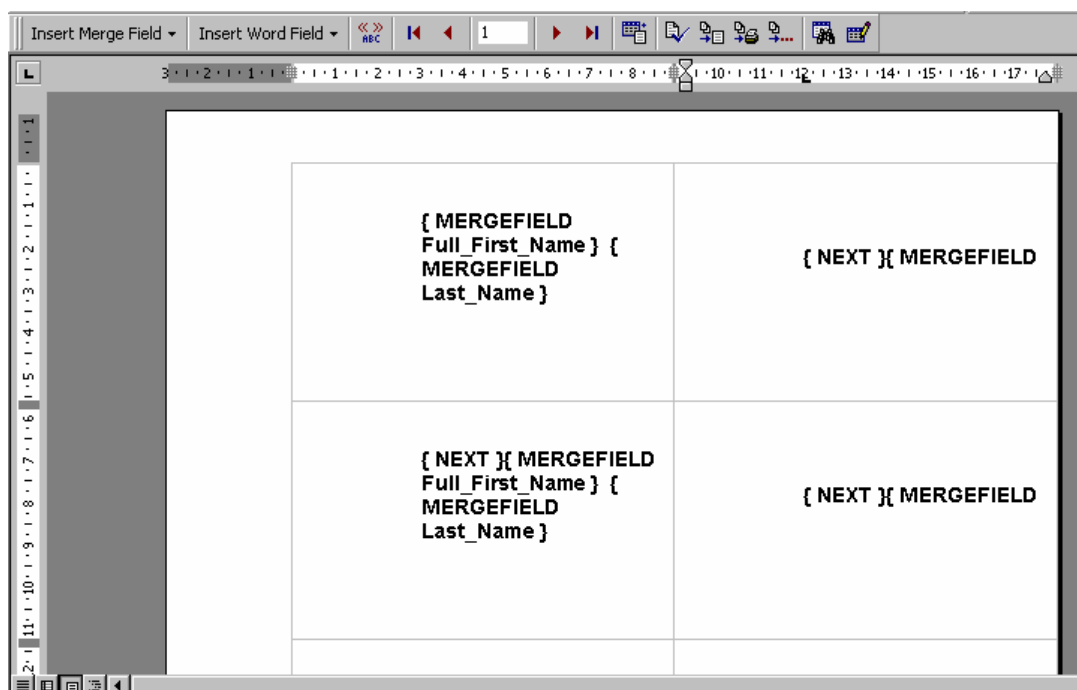


- 10 Give the label a name if required for re-use. Do not concern yourself with the page margins as these can be reset from the document. When label sizes are correct, click *OK*.

- 11 A Create Labels dialog box is shown. Select the Merge Fields you wish to use. For a name tag please note that First\_Name may only contain an initial and therefore Full\_First\_Name is a better option to use.



- 12 Once the fields required have been selected for the document, click *OK*.



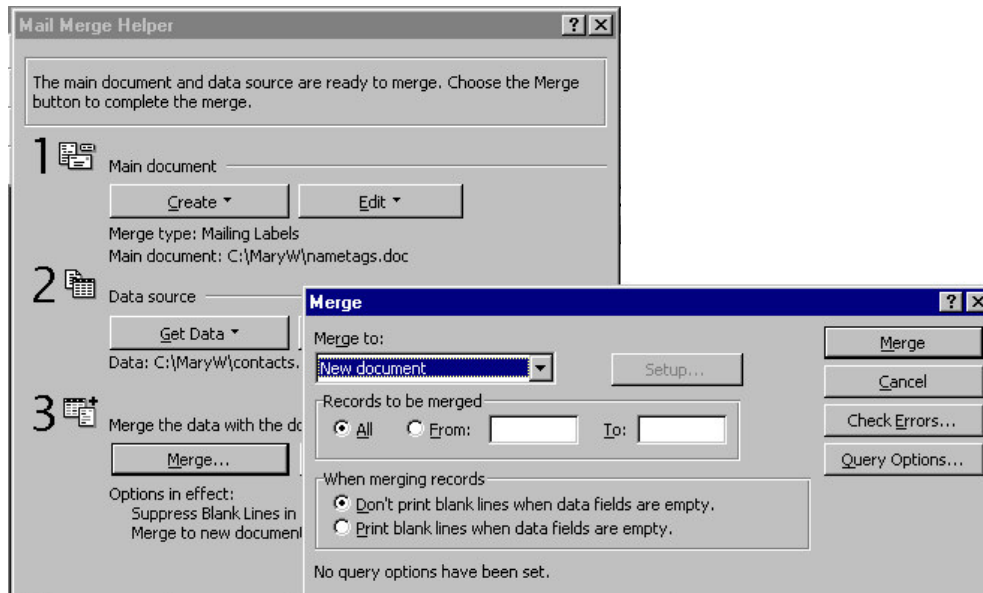
- 13 Document will be displayed with the merge fields shown. Select and format the text as required. Do not be concerned if because of the merge fields the information flows to more than one line. If it is necessary to change any of the information, the Mail Merge Dialog box can be recalled from the *Tools* menu, *Mail Merge*. Change the page margins if necessary through *File, Page Setup*.

## Do Mail Merge in Word

Open your previously saved mail merge document. If no document is available, refer to *Create Document Template in Word* earlier in this section.

1 Click *Tools* from the bar menu

2 Select *Mail Merge*



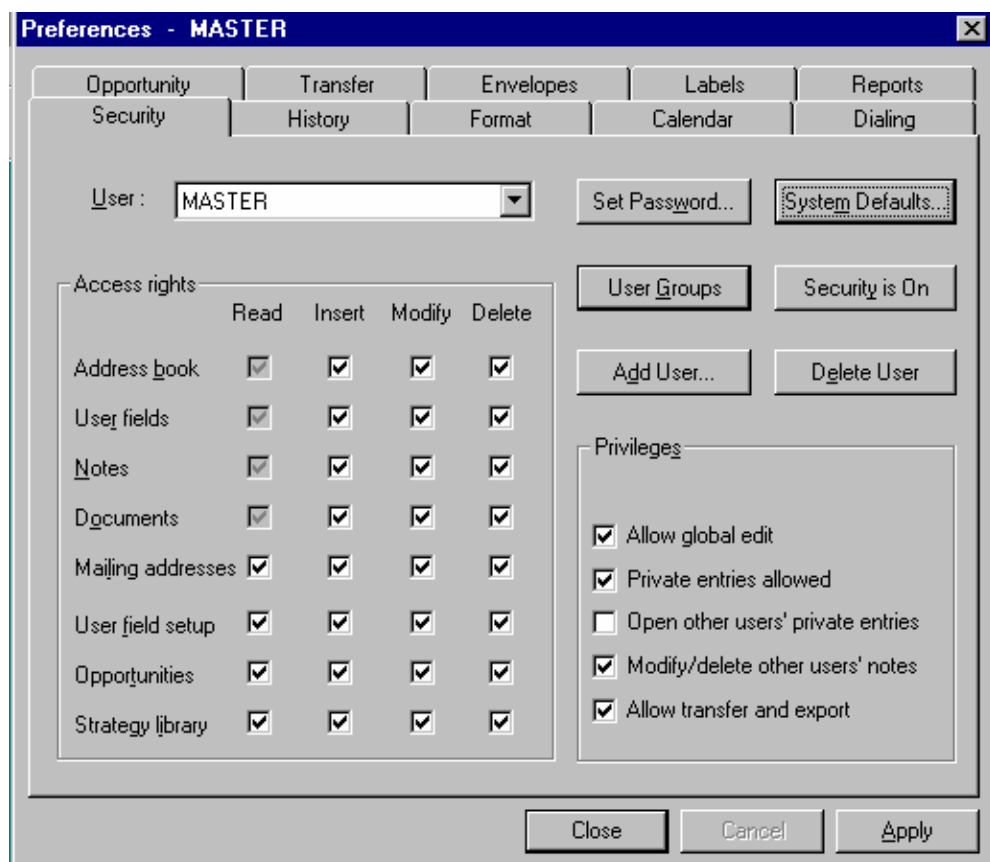
3 Change any options as required and select Merge. If the merged document is incorrect, change the document template as required and re-save. Then repeat the merge process.

## Maintenance

### Security

New users may be added to the system and permissions set, new passwords may be set, users may be added or removed from groups, new groups may be added.

- 1 From the bar menu select *File*
- 2 Select *Preferences*
- 3 Click on the *Security* tab



### Add Users

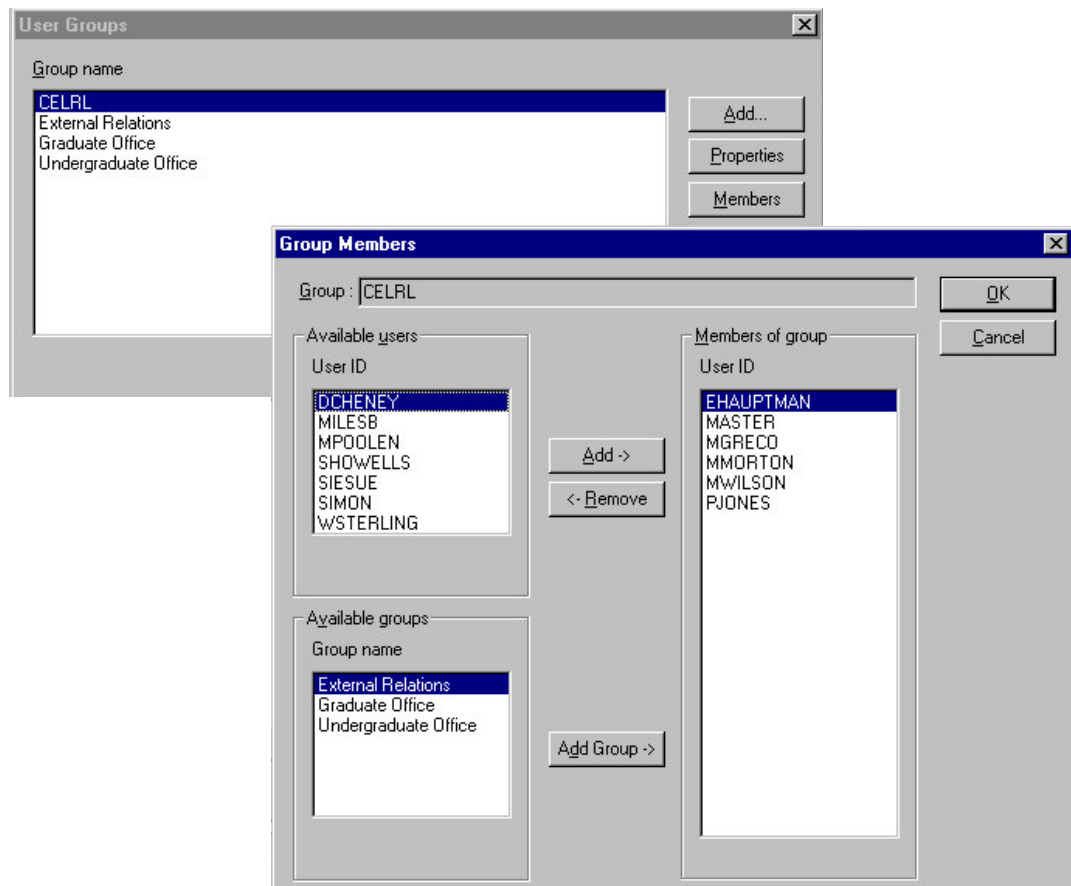
- 1 Click *Add User*
- 2 Enter the user ID
- 3 Assign a Password to this user through *Assign Password*
- 4 Select the user's ID under *Select User*
- 5 Allocate the appropriate privileges to the user by clicking and unclicking the boxes.

## Groups

Users can belong to certain Groups. User defined fields can be assigned to a group and only the members of this group will be able to use this field.

To assign a user to a group:

- 1 Click *User Groups*



- 2 Click *Members*

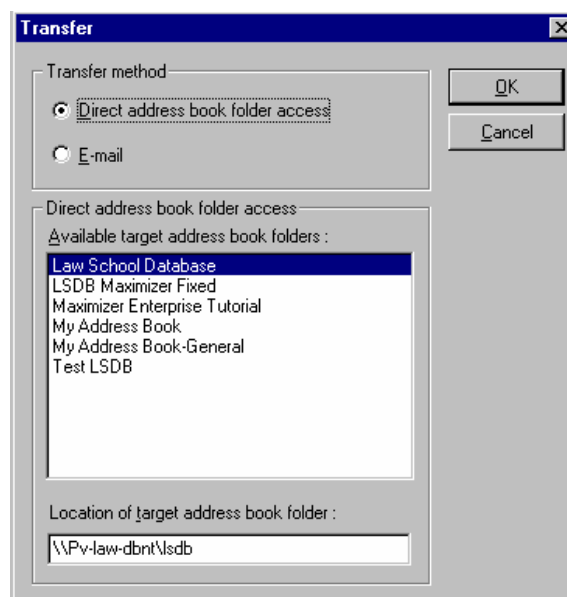
Add and remove individuals from specified groups.



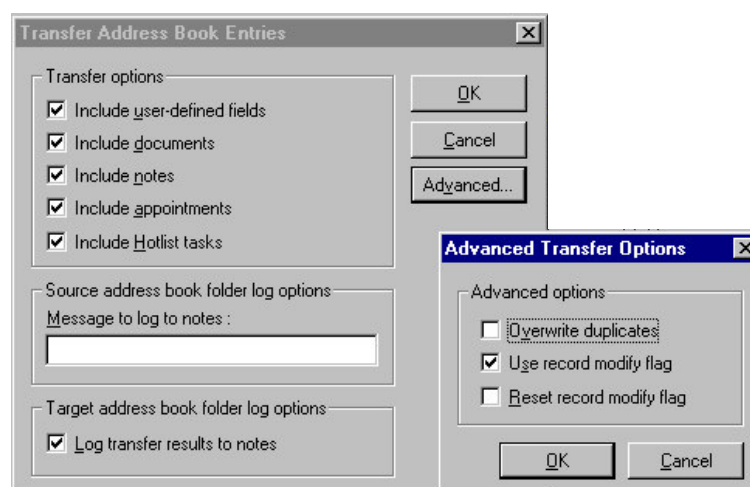
## Transfer Entries Between Address Books

It is possible to transfer single or multiple entries from one address book folder to another address book folder. This may be required if entries need to be transferred from a back-up copy of Maximizer. To do this:

- 1 Select the address book entries to be transferred
- 2 Select *File*
- 3 Select *Transfer*
- 4 Select *Address Book Entries*



- 5 Highlight the name of the address book to which the selected records are to be transferred and click *OK*



- 6 A form showing transfer options will be displayed – select and deselect options as required. The *Advanced* button gives access to further options.

Note: Records will not be duplicated and therefore will not transfer if they already exist in the target database unless the *Overwrite Duplicates* option is selected.

When the record(s) have been transferred a status box will be displayed indicating the results of the transfer.

**Transfer Summary**

Source user ID : MASTER      Transfer start time : 11:38:36  
 Target user ID : MASTER      Transfer end time : 11:38:37

Transfer summary

	<b>Inserted</b>	<b>Modified</b>	<b>Bypassed</b>	<b>Deleted</b>
Companies/Individuals :	0	0	1	n/a
Contacts :	0	0	0	0
Mailing addresses :	0	0	0	0
User-defined fields :	0	0	0	0
Documents :	0	n/a	0	0
Notes :	0	n/a	0	0
Appointments :	0	0	0	0
Hotlist tasks :	0	0	0	0
User field headings :	0	n/a	n/a	n/a
User field items :	0	n/a	n/a	n/a
IDs changed : 0				

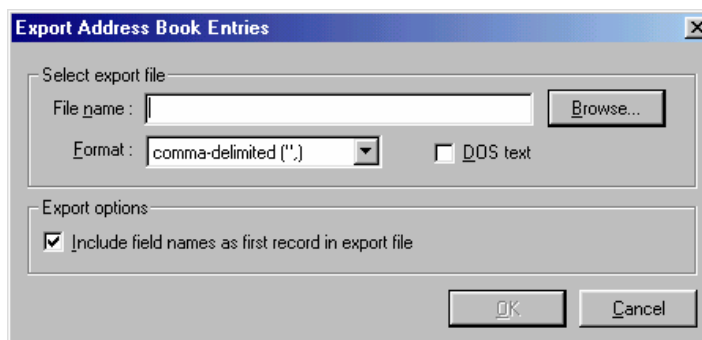
Transfer options

Message logged to source : No      Overwrite duplicate entries : No  
 Log results to target : No      Use record modify flag : Yes  
 Transfer user-defined fields : Yes      Reset record modify flag : No  
 Transfer documents : Yes  
 Transfer notes : Yes  
 Transfer appointments : Yes  
 Transfer Hotlist tasks : Yes

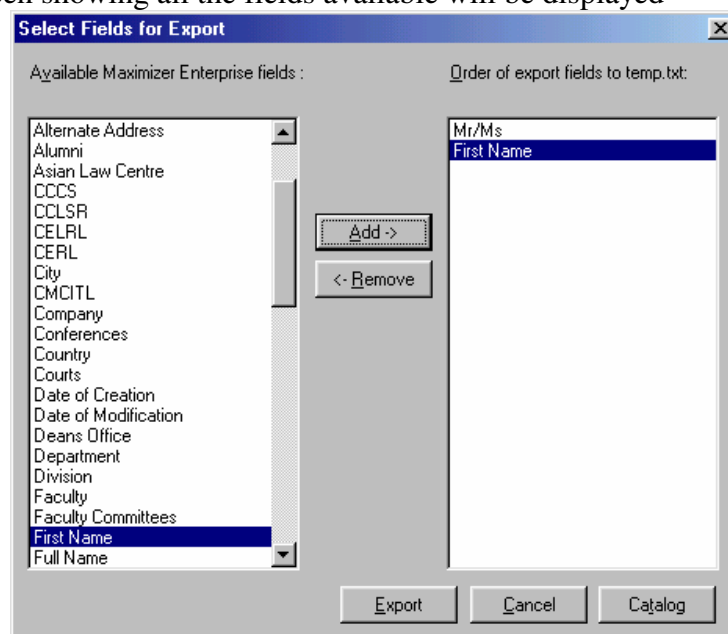
Print...      Close

## Export Entries

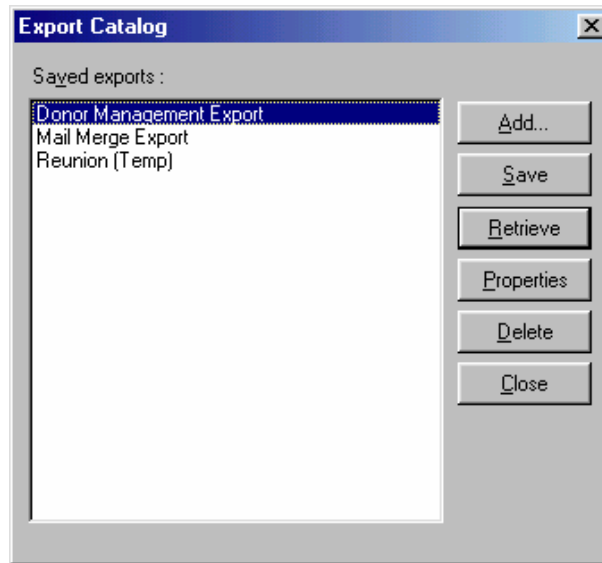
- 1 Select the entries to be exported
- 2 Select *File*
- 3 Select *Export Address Book Entries*



- 4 Enter path and name or use the *Browse* option. Make sure *Include field names* is selected, *OK*.
- 5 A screen showing all the fields available will be displayed



- 6 You can select the fields that you wish to export manually at this point or you can Click *Catalog* to bring up previously saved export lists. The saved lists will be displayed.



- 7 Highlight *Mail Merge Export* and then click *Retrieve*. If this list is not shown, create by selecting the relevant fields in (5) above and save under *Catalog*.
- 8 Click *Export* and selected records will be saved to a text file.

## Import Records

New records can be imported into Maximizer from a text file. This is a two stage process. First any Company and Individual entries are imported followed in the second stage by any Contacts.

To import new entries:

- 1 Create two text files for importation: the first for Companies and Individuals, the second for Contacts only. The text files should be tab-delimited and formatted similar to the samples shown below:

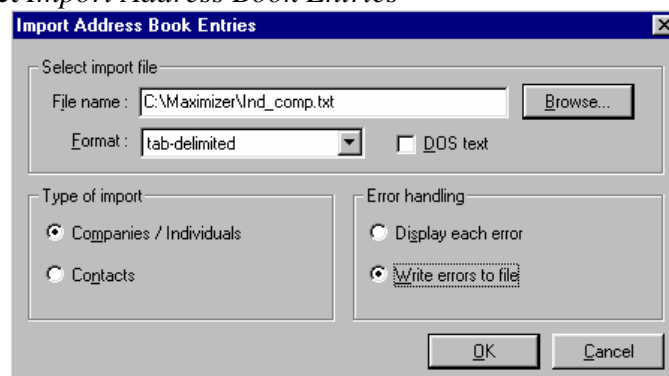
**Companies & Individuals** (g:\admin\network\databases\Maximizer\Ind\_comp.txt) :

Title	First name	Last name	Position	Company	Address1	Address2	City	State	Postcode	Country
				News Ltd	1 George St		Sydney	NSW	2000	
				AMP	501 Collins St		Melbourne	VIC	3001	
				U.Tasmania	Faculty of Law		Hobart	TAS	7001	
Ms	Elle	Portzikova			Unit 3	9 Millan Ave	Torak	VIC	3019	
Mr	Don	Hooks			5 Park St		Melbourne	VIC	3001	
Mr	Peter	Smith			311 Sturt St		Southbank	VIC	3006	

**Contacts** (g:\admin\network\databases\Maximizer\Cont.txt) :

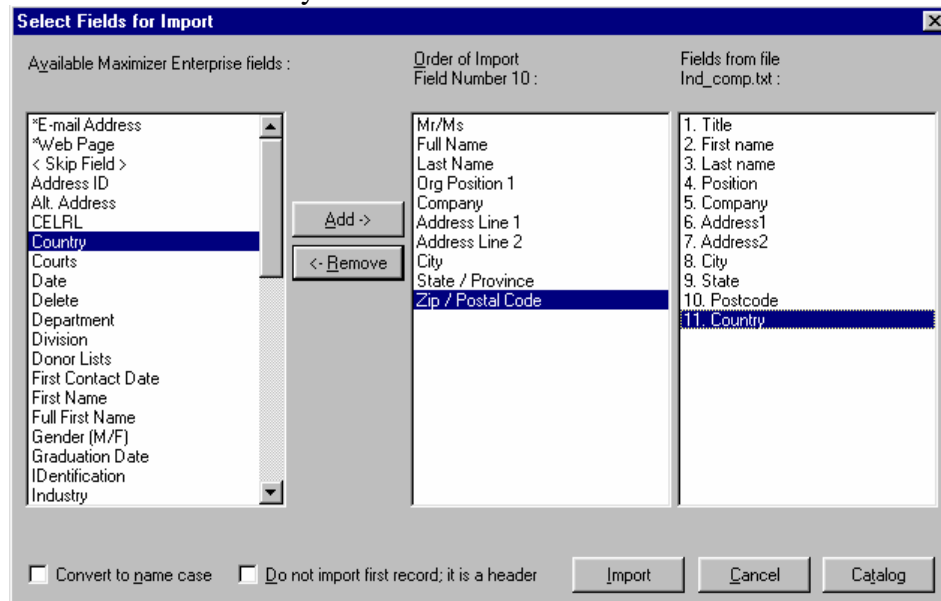
Title	First name	Last name	Position	Company	Address1	Address2	City	State	Postcode	Country
Ms	Cindy	Seymore	CEO	News Ltd	1 George St		Sydney	NSW	2000	
Ms	Stephanie	McPherson	Manager	AMP	501 Collins St		Melbourne	VIC	3001	
Prof	Don	Chalmers	Dean	U.Tasmania	Faculty of Law		Hobart	TAS	7001	

- 2 In Maximizer, select *File*
- 3 Select *Import Address Book Entries*



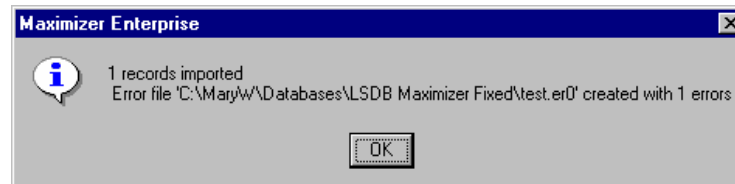
- 3 Locate the text file to be imported using the *Browse* button.
- 4 Click the *Write errors to file* button. Invalid records will be logged to a file called "*import-file name.ERO*". You find this file in the same folder as the original import file.
- 5 Set the *Type of Import* to be "Companies/Individuals."
- 6 Click *OK*

- 7 Match the order of the fields for import with those in the text file, the names in the text file may differ.

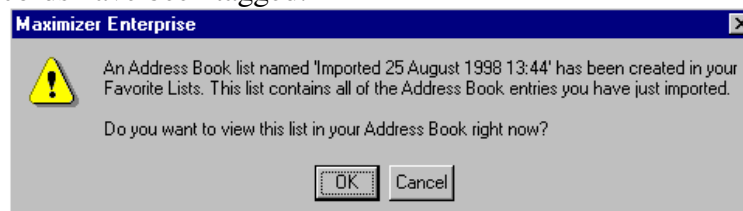


**NOTE:** You can use <Skip Field> to skip a header that isn't needed in the merge.

- 7 Check whether the first record requires importing. Again a format may have been saved under *Catalog* which can be reused.
- 8 When ready click *Import*. If errors are created a message will display showing where the error file has been saved.



When completed a message box will be displayed showing how the imported records have been tagged.



At this point, you can do a Global Edit to add all these records to a list or add a Date of Creation etc.

- 9 Now repeat the above steps (1-8) for Contacts; modify step 5 as appropriate.

## Minimizing Errors when Importing Records

When importing records, there may be companies that are already on Maximizer, but at different addresses or slightly different names. To try and make sure that the contacts end up attached to the right companies at the right address, you may wish to try this method of importing records.

After doing the data entry or cleaning up/sorting out the data available, instead of importing the company and contact entries with the Real Company Names, give them numbers for the different names at different addresses. eg. below there are 2 different addresses for Baker & McKenzie. If we imported this as per normal, we would end up with contacts attached to incorrect records.

D	E	F	G	H	I	J	K	L
1	Sname	Position	Company	Real Company Name	Add1	Add2	City	State P/code
2	Grant	Regulatory Manager	1	AAPT Ltd	9 Lang Street		SYDNEY	NSW 2000
3	Griffith	Network Manager	2	ABC Multimedia	700 Harris Street		SYDNEY	NSW 2007
4	Carrick	Law Report	3	ABC Radio	GPO Box 9994		MELBOURNE	VIC 3000
5	Vidler		4	ACCC	PO Box 1199		DICKSON	ACT 2602
6	Butt		5	Allen Allen & Hemsley	The Chifley 2 Chifley		SSYDNEY	NSW 2000
7	McGill	Partner	5	Allen Allen & Hemsley	Chifley Tow 2 Chifley		SSYDNEY	NSW 2000
8	Sainty		5	Allen Allen & Hemsley	Chifley Tow 2 Chifley		SSYDNEY	NSW 2000
9	Nichol		6	Anderson Rice	Level 10 555 Lonsd		MELBOURNE	VIC 3000
10	Magid		7	Arnold Bloch Leibler	Level 21 333 Collins		MELBOURNE	VIC 3000
11	Forsyth		8	Arthur Robinson & Hedderwicks	530 Collins Street		MELBOURNE	VIC 3000
12	Jarvis		8	Arthur Robinson & Hedderwicks	530 Collins Street		MELBOURNE	VIC 3000
13	Peter		8	Arthur Robinson & Hedderwicks	Stock Exc 530 Collins		MELBOURNE	VIC 3000
14	Thompson		8	Arthur Robinson & Hedderwicks	530 Collins Street		MELBOURNE	VIC 3000
15	Flahvin		9	Baker & McKenzie	AMP Cent 50 Bridge		SYDNEY	NSW 2000
16	O'Brien		9	Baker & McKenzie	50 Bridge Road		SYDNEY	NSW 2000
17	Golding		10	Baker & McKenzie	Level 39, F525 Collins		MELBOURNE	VIC 3000
18	McConnell	Associate	10	Baker & McKenzie	Level 39, F525 Collins		MELBOURNE	VIC 3000
19	Murphy	Associate	10	Baker & McKenzie	Level 39, F525 Collins		MELBOURNE	VIC 3000
20	Cahill	Partner	11	Blakes	Grosvenor 225 Georg		SYDNEY	NSW 2000
21	Choy-Flannigan		11	Blakes	Grosvenor 225 Georg		SYDNEY	NSW 2000
22	Cosentino	Partner	11	Blakes	Grosvenor 225 Georg		SYDNEY	NSW 2000
23								

To avoid this, we assign numbers to each company at a new address. So when we set up the text file for importing the Company Records, it looks a little like below:

	A	B	C	D	E	F	G	H	I
1	Company	Add1	Add2	City	State	P/code	Country		
2	1	9 Lang Street		SYDNEY	NSW	2000			
3	2	700 Harris Street		SYDNEY	NSW	2007			
4	3	GPO Box 9994		MELBOURNE	VIC	3000			
5	4	PO Box 1199		DICKSON	ACT	2602			
6	5	The Chifley 2 Chifley		SSYDNEY	NSW	2000			
7	6	Level 10 555 Lonsd		MELBOURNE	VIC	3000			
8	7	Level 21 333 Collins		MELBOURNE	VIC	3000			
9	8	530 Collins Street		MELBOURNE	VIC	3000			
10	9	AMP Cent 50 Bridge		SYDNEY	NSW	2000			
11	10	Level 39, F525 Collins		MELBOURNE	VIC	3000			
12	11	Grosvenor 225 Georg		SYDNEY	NSW	2000			
13									
14									

When you import the contacts you use the numbers instead of the Real Company Names so that they are attached to the correct records.

Once the Importing is done, you can rename the company records (see *Editing a Company's Details* for help).

If you then find that the imported company already has a Company record in Maximizer at the same address, you can *Merge* the entries to leave only one company at its correct address.



## **Microsoft Access to Maximizer**

An Access database has been set up which uses ODBC to connect to the Maximizer tables. This database holds two reports and can be used for global updates and changes which may be difficult through Maximizer itself. However use of Maximizer data through Access is extremely slow and fields are not always updatable.

The database is called maximiser.mdb and is currently held under:

G:\admin\network\databases\maximiser\maximiser.mdb

### **Access Reports**

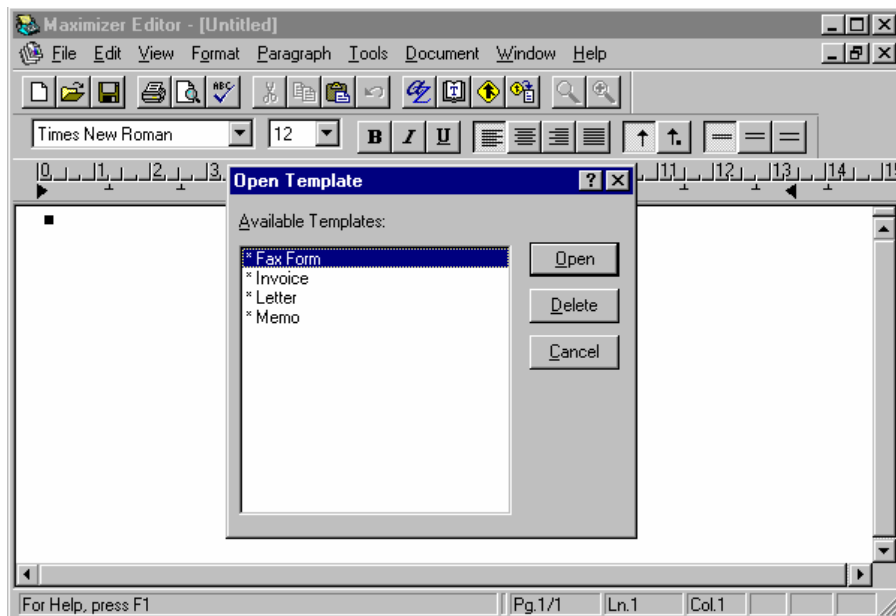
Two reports have been created within Access. One is dynamic and gives the names of all the lists held in Maximizer. The second one is static and gives the lists plus the number of contacts within that list as at that time.

## Maximizer Editor

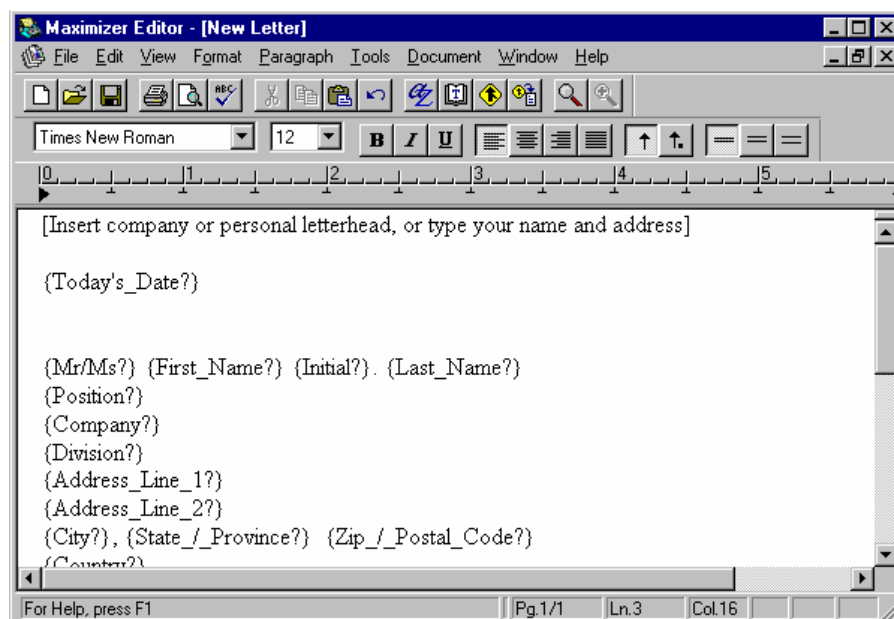
Mail Merge within Maximizer can be used via the Maximizer Editor

### Creating a New Merge Template in Maximizer Editor

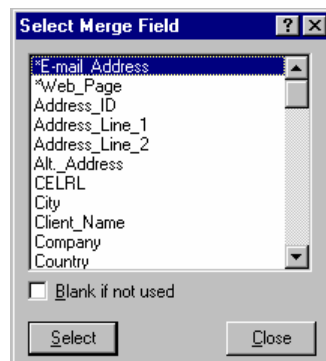
- 1 Select *Tools* from the bar menu
- 2 Select the *Maximizer Editor*. Once this opens, go to *File* and *Open*.



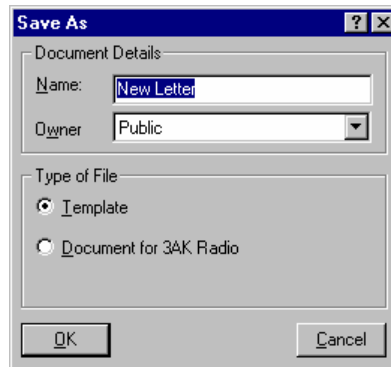
- 3 A dialog box will display showing the templates available. Select the template required or a template nearest your requirements, and Click *Open*.



- 4 It may now be necessary to add your own merge fields. To see the fields available select *Tools* from the bar menu and *Merge Fields*.



- 5 Double click any fields to add them to the document. Make sure *Blank if not used* is selected if you wish space not to be left in the document when text is missing from a field. If you wish to remove any fields already displayed in the document simply delete.
- 6 When the document is ready for use select *Save As* from the file menu.

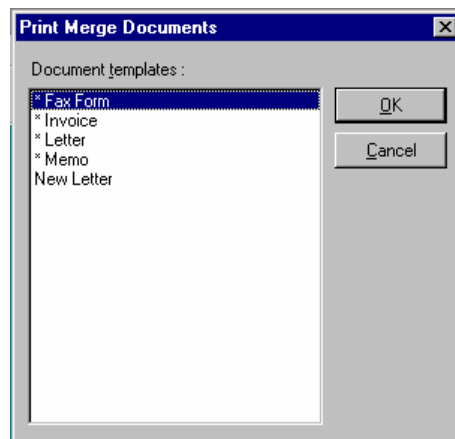


- 7 Give the document a new *Name*, save as a *Template* and either make the document available for Public viewing and use, or change the owner to a specific group for restricted use.

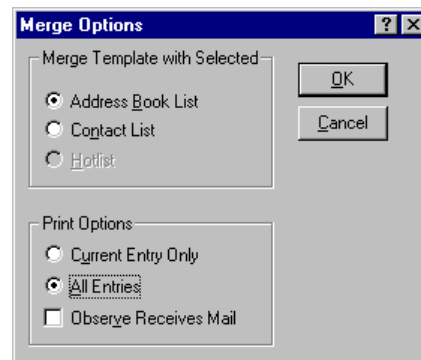
## Mail Merge using Maximizer's Editor

If the merge document is still to be created, refer *Creating a New Merge Template in Maximizers Editor* within this section. To use a document already created:

- 1 Select the list of records to be mail merged. Refer to the *Mailing List* section of the manual if required.
- 2 Select *File* from the bar menu.
- 3 Select *Print*, and *Merge Documents*.

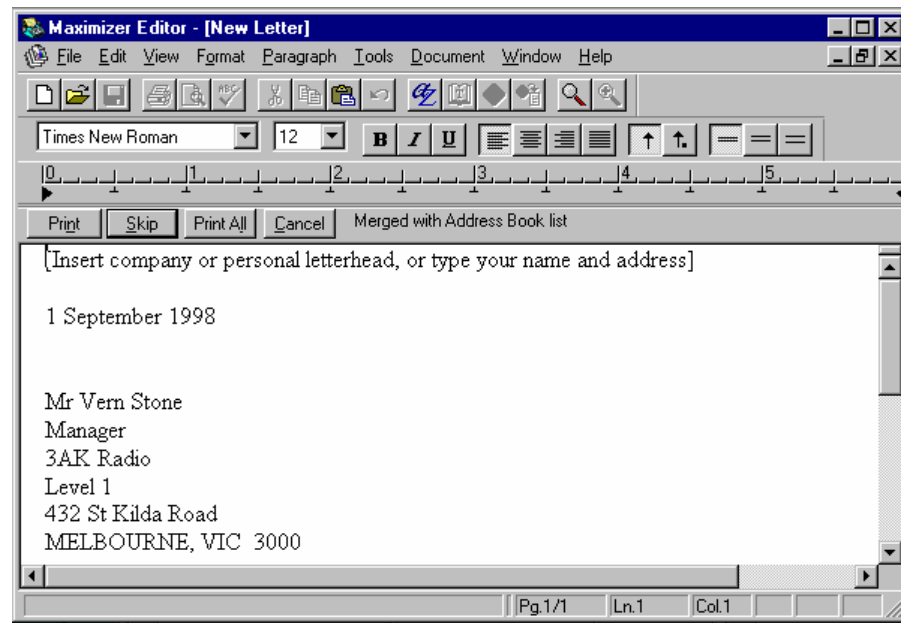


- 4 Highlight the document with which you wish to merge and click *OK*. The Maximizer Editor will open with the selected document and a dialogue box with merge options will be displayed.



- 5 Select *Address Book List* and *All Entries*, unless current entry only is required.

- 6       Maximizer Editor will display the first of the entries in the list.



- 7       A new bar menu will be displayed giving the options: *Print*, *Skip*, *Print All*, and *Cancel*.
- 8       To print all the list select *Print All*. A print dialog box will be displayed. Select *Print* or *Cancel*.